

TORQUE
SOFTWARE



FMCS USER GUIDE

Home Garaging

FMCS Version 5.5 to 5.8

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A NEW HOME GARAGING ARRANGEMENT APPLICATION

Home Garaging Arrangements can be requested by staff members to garage departmental vehicles at a staff member's home on an ad hoc basis, or a long-term basis, for varying lengths of time. Applications include the location of the garaging and the reason why home garaging is required. Depending upon the responses in some fields, the application form will change requesting more, or less information, to be entered as appropriate.

The Application Process

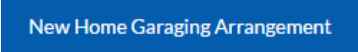
Approval work flows will be generated and configured by your Module Administrator. There are four possible workflow steps in the Application Process. However, your Module Administrators may choose to turn the Endorser Approval step off, or only trigger it on long term arrangements, when they configure the FMCS for your organisation.

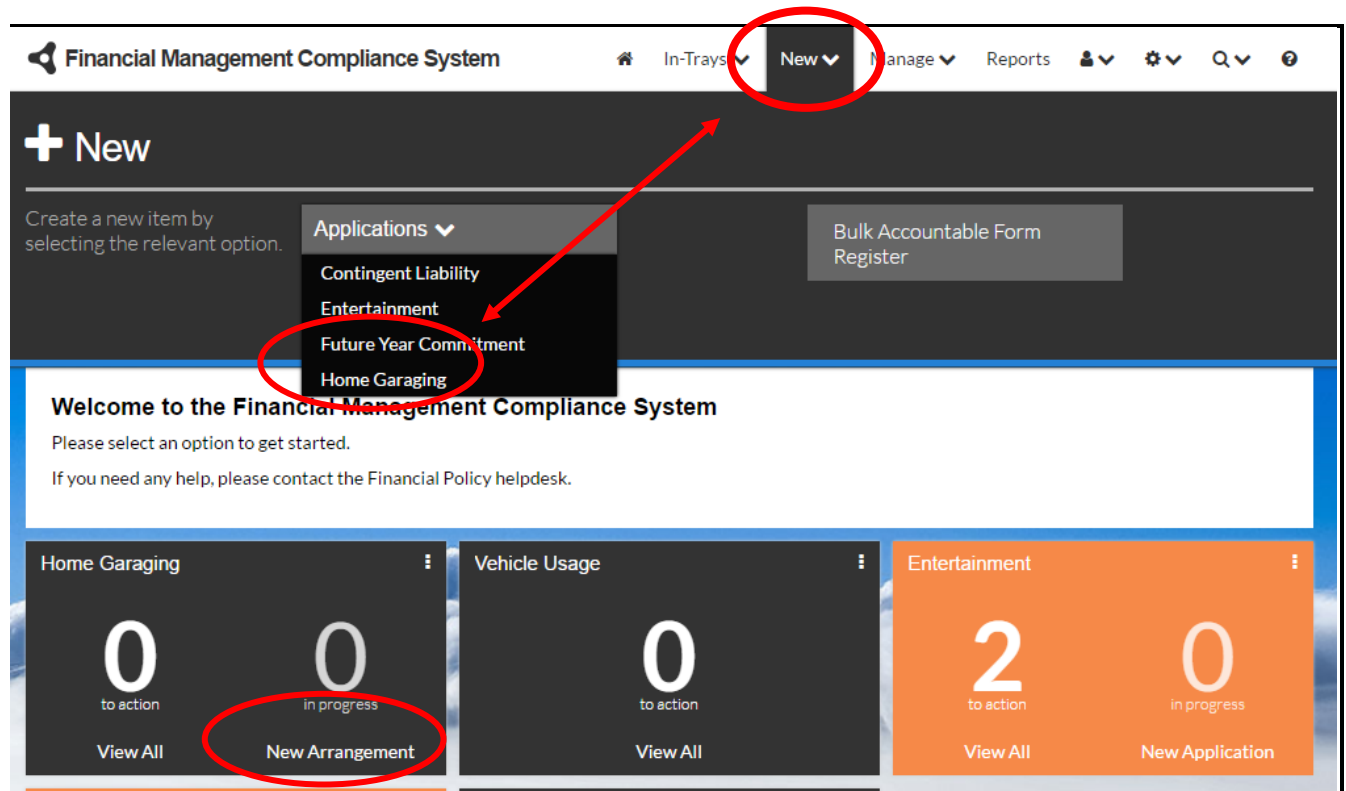
1. Application Submission
2. Administrative Review*
3. Endorser Approval*
4. Delegate Approval.

* Optional approval steps. These are configurable by the module administrator. If the Module Administrators have configured FMCS to use the Processing Team workflow, the Administration Review and Endorser Approval steps will be triggered if the required circumstances are met. The Administration Review allows the Administration Team to review the application for correctness before proceeding to the Endorser and the Delegate for approvals.

Entering a new Home Garaging Arrangement

You can enter a new Home Garaging Arrangement by either:

1. Going into your Home Garaging In-Tray and selecting the  button, or
2. Selecting the New Arrangement button from the Home Garaging Tile, or
3. By clicking on the New menu at the top of screen, Applications, then, Home Garaging.



At any time while filing in the Application you can:

- Cancel** This will delete the work entered. You will be asked to confirm this function before FMCS deletes the work. Selecting OK will take you back to the Home Garaging In-Tray.
- Save Draft** Selecting this option will save any information entered, allowing you to come back to work on this application further.

The Home Garaging Application Form Explained

Your Module Administrators will have designed the form with helpful information and links at the top of the screen. They may also configure the form to show less information than is described in this section, depending upon the level of authorisation required by your organisation.

The status of the application will be displayed in a black ribbon under the introduction information. Initially this will appear displaying Draft until the application is submitted.




After information has been entered and the information is saved, the ribbon will display the updated status – such the example as below.



Information to be entered:

Applicant	Cate Jostsons (cate) cate.jostsons@torquesoftware.com.au
Organisational Structure	Secretary's Office / Business Group 1
Contact Phone	555 555 555
Vehicle	YJM17A - Ford Falcon
Finance Officer	First Assistant (FAS1) FAS1@torquesoftware.com.au

Applicant

FMCS will display the details of the officer entering the application. Module Administrators may enter an application on behalf of another officer. They can change the Applicant name by clicking on the  icon in the field. Type in the person's name (or part thereof) and select the Search button. If they are a past employee, tick the box below the search field. Select the appropriate person's name from those provided. Note: the Responsible Organisation Unit will update accordingly.

Important: If an application is submitted on behalf of another applicant, submitting will send the application in Draft form to the applicant for review and submission.

Organisational Structure This field will default to the organisation unit of the Applicant (if the organisation unit has been configured by the Module Administrator). To change the Organisation Structure select from the drop down options. Note: your Module Administrator may have configured the Responsible Organisation Unit field label with a different name.

Contact Phone This is a manual field and is not linked to the applicant's name.

Vehicle This is a mandatory field. Click on the Search Icon. Enter all, or part of the vehicle's VIN or Rego number, and click on the Search button. Select the required vehicle from the options presented.

Note: This is not a booking system for vehicles. Applicants must ensure the vehicle is available before entering an application for a specific vehicle.

Finance Officer The Finance Officer does not form part of the approval process. They can, however, view any applications which they are nominated in by accesses them through the In-Tray. Module Administrators may also configure FMCS to send emails to alert Finance Officers they have been selected in an application. Select a Finance Officer. Click on the Search Icon. Enter all, or part of the Finance Officer's name, and click on the Search button. Select the required officer from the options presented. **Important:** The Finance Officer cannot be the same as the Endorser or the Delegate.

Proposed Garaging Address

Proposed Garaging Address

Address

Security

- Car port
- Lockable garage
- Lockable gates
- Other

Distance from Office (KMs)

Reason for garaging

- Vehicle is required for out-of-hours business purposes and it is not practical, efficient or possible to return the vehicle to its 'normal' office garage location on the day of use.
- The vehicle is required by the department official on the following business day for business purposes and it would be inefficient for the vehicle to be collected from its office garage location. This includes where there is a need for an early start of late return in relation to a trip away from the usual place of work.
- Blanket approval - Vehicle is required for a regular out-of-hours business purpose and it is not practical, efficient or possible to return the vehicle to its 'normal' office garage location on the day of use.
- Blanket approval - the vehicle is required by the department official on the following business day for business purposes and it would be inefficient for the vehicle to be collected from its office garage location. This includes where there is a need for an early start of late return in relation to a trip away from the usual place of work.
- Other

Address Type in the proposed address that the vehicle will be garaged at.

Security The Module Administrator can configure these options as appropriate for your organisation. Select the most appropriate. If "Other" is selected, further information may be required to be entered.

Distance from Office Enter in kilometres how far from the Office to the address the vehicle will be garaged at.

Reason for garaging The Module Administrator can configure these options as appropriate for your organisation. Select the most appropriate. If "Other" is selected, further information may be required to be entered.

Module Administrators may configure the FMCS to require Endorser approval for some Home Garaging reasons.

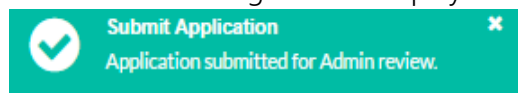
Proposed Agreement

The screenshot shows a form titled "Proposed Agreement" with the following fields:

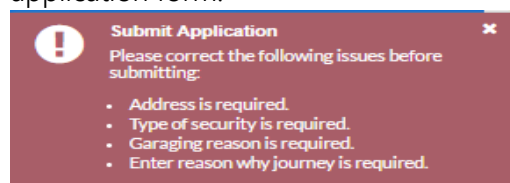
- Start date:** 21/06/2017
- End date:** 30/06/2018
- Reason why journey is required:** A large empty text area.
- Provide a reason if any non-departmental passengers are being carried:** A large empty text area.
- Endorser:** First Assistant (FAS1) FAS1@torquesoftware.com.au
- Delegate:** Deputy Secretary1 (DS1) DS1@torquesoftware.com.au

Start Date & End Dates Enter the start and end dates of the application.
Note: The Module Administrator may configure FMCS to require an Endorser authorisation depending on the length of time the arrangement is requested for. For example: the application may only require Delegate agreement for arrangements less than one month, but may need an Endorser level authorisation for arrangements spanning more than one month. FMCS will reconfigure information required depending upon how the Module Administrator has configured the Home Garaging Module.

Blanket Approval	A Blanket Approval is a long term arrangement allowing an Applicant to home garage a vehicle multiple times as required (but not every day) over a defined period of time without having to submit individual applications for each instance.
Reason why journey Rqd	Enter a brief description of the reason why this arrangement is being sought.
Non-Department Passenger	If non-departmental passengers are being carried, a reason must be entered here.
Endorser and Delegate	The FMCS will default to display the Applicant's supervisor in the organisation structure for the Endorser and Delegate fields. However, should this not be appropriate, it can be changed by clicking on the Search Icon. Enter all, or part of the Officer's name, and click on the Search button. Select the required officer from the options presented.
Additional Attachments	Attachments may be uploaded with the application by clicking on the Browse button, searching the network and selecting the required document. Click on the "Open" button. Attachments can be removed by clicking the Remove button.
Comments	Additional comments may be added to this field. Comments may be cut and pasted from another document or typed directly into the field.
Submit	By selecting the Submit button you are applying to the nominated Approver(s) to assess your application. You will be asked to confirm your submission. Select the OK button. The Module Administrator may have configured a Certification to be submitted at this time. Select Submit to proceed. If the application has been successfully submitted a green Submit confirmation message will be displayed.



If your application is incomplete or contains errors an Error Message will be displayed with the actions to be completed/corrected. The fields to be amended will be displayed in red when re-opening the application form.



ADMIN REVIEW OF A SUBMITTED HOME GARAGING APPLICATION

Who can be an Admin Reviewer?

Permission to be an Admin Reviewer is granted by the Module Administrator.

When does the Admin Review Happen?

An Admin Review is triggered if an Endorser Approval is required.

What does the Admin Review Do?

The Admin Review is not an approval process – it is a review process. As such the Admin Review cannot approve or reject the application. This step is to review and assess if an application is consistent with internal policy and procedures before progressing to the Endorser for Approval.

The Admin Reviewer can perform the following actions:

1. Review and edit the application,
2. Return the application to the applicant
3. Delete the application,
4. Save the application for further consideration
5. Submit, or forward the application to the next step of the approval process.

Reviewing the Application

The Admin Reviewer can edit any field in the application by simply overtyping the field. It is recommended, however, that the application be returned to the Applicant for correction of errors as a learning process.

Names of Applicant, Finance Officer, Endorser and Delegate can be changed by clicking on the Search Icon. Enter all, or part of the Officer's name, and click on the Search button. Select the required officer from the options presented.

Note: The Organisational Structure will update if the alternative applicant is in a different organisational structure.

After reading the application and considering the case put forward for a home garaging arrangement, the Admin Reviewer can decide whether a financial Contribution is Required by the Applicant to offset FBT liabilities. A contribution amount and a reason must be entered supporting the contribution decision.

Contribution	
Contribution Required	<input checked="" type="radio"/> Yes <input type="radio"/> No
Amount	\$100.00
Reason	This arrangement involves personal use.

The Administrator can record any comments appropriate in the field below.

Administrator's Comments	
--------------------------	--

Returning an application for Amendment

Should the application need to be returned to the applicant, click on the **Return for Amendment** button. A text box will appear allowing for comments to be included in the email the applicant will receive notifying them that their application has been returned for amendment. When completed, select the Return for Amendment button on the dialogue box.

The application is now returned to the Applicants In-Tray in Draft Status.

Deleting the Application

If the application needs to be deleted, select the **Delete** button at the bottom of screen. A dialogue box will appear requesting confirmation to Delete. Select OK to proceed.

The application is now deleted. Note: deleted applications can be viewed by selecting the Deleted status in Reports.

Submitting the Application

Once the application has met all the criteria for the vehicle to be Home Garaged the Admin Reviewer can Submit the application by clicking on the **Submit** button. A dialog box will appear requesting confirmation to Submit. Select OK to proceed.

If an error has occurred, an error message will appear with details how to correct the error.

If the submission has been successful, and message appear confirming the submission.

What happens Next?

Once the Admin Reviewer has submitted the application successfully, it will progress through to the Endorser for approval. The application will now be in the "In Progress" section of the Admin Reviewer's In-Tray.

ENDORSER REVIEW

Who can be an Endorser Reviewer?

Anyone can be selected as an Endorser. However, the endorser you select should be based on the policy of your organisation.

When does the Endorser Review Happen?

The Endorser Review may be the second step of the approval process for an application to Home Garage a vehicle. This approval step is optional and can be configured by the Module Administrator.

Organisations may require an Endorser Review for Home Garaging Arrangements that span a significant amount of time, defined by the Module Administrator.


What does the Endorser Review Do?

The Endorser Review can be an additional step to approve certain arrangements. It may be required for longer term arrangements, or some Garaging Reasons, as defined by the Module Administrators.

The Endorser Reviewer cannot edit or amend the application. They can only:

1. Return the application to the applicant,
2. Save the application for further consideration
3. Submit, or forward the application to the next step of the approval process.

Returning an application for Amendment

Should the application need to be returned to the applicant, click on the  button. A text box will appear allowing for comments to be included in the email the applicant will receive notifying them that their application has been returned for amendment. When completed, select the Return for Amendment button on the dialogue box.

The application is now returned to the Applicant's In Tray in Draft Status. The approval process starts again including progressing through Admin Review again.

Save the Application

At any stage the Endorser can save the application for later review by clicking on the Save button.

Reviewing the Application

The Endorser cannot amend or alter any part of the application. It is required to be read and Returned or Endorsed only.

The Module Administrator will most likely have created an Endorser Approval preamble that the Endorser is required to agree with prior to progressing the application to the next stage.

Rejecting the Application If the Reviewer selects the negative button it is mandatory to complete the comments section. Then select the Submit button. A dialogue box will appear asking for confirmation of the action. Select OK to Reject.
The Application is now Rejected.

If the application was Rejected in error, contact the Module Administrator to Unlock the application and Return to Applicant, The process will start from the beginning of the approval process again.

Accepting the Application If the Endorser accepts the application and will endorse the arrangement, select the positive response. It is not mandatory to enter a comment with a positive response.

Select the Submit button. A dialogue box will appear asking for confirmation of the action. Select OK to progress the application to next stage. A confirmation will appear that the application has been submitted..

The Application is now Progressed.

What happens Next?

Once the Endorser Reviewer has submitted the application successfully, it will progress through to the Delegate Review. The application will now be in the "In Progress" section of the Endorser's Reviewer's In-Tray.

DELEGATE REVIEW

Who can be a Delegate Reviewer?

Anyone can be selected as a Delegate. However, the delegate you select should be based on the policy of your organisation.

While it is not a mandatory requirement, it is recommended that the Delegate Reviewer be different to the Endorser if that approval step is used.

When does the Delegate Review Happen?

The Delegate Review is the final step of the approval process for an application to Home Garage a vehicle.


What does the Delegate Review Do?

The Delegate Review is a spending authority to decide if the organisation wishes to incur the associated costs of allowing the vehicle to be home garaged.

The Delegate reviewer cannot edit or amend the application. They can only:

1. Return the application to the applicant,
2. Save the application for further consideration
3. Approve or Reject the application.

Returning an application for Amendment

Should the application need to be returned to the applicant, click on the  button. A text box will appear allowing for comments to be included in the email the applicant will receive notifying them that their application has been returned for amendment. When completed, select the Return for Amendment button on the dialogue box.

The application is now returned to the Applicant's In-Tray in Draft Status. The approval process starts again including progressing through Admin, and the Endorser Review again if required.

Save the Application

At any stage the Endorser can save the application for later review by clicking on the Save button.

Reviewing the Application

The Delegate cannot amend or alter any part of the application. It is required to be read and Returned or Endorsed only.

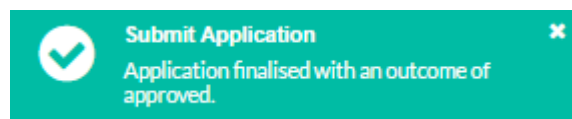
The Module Administrator will most likely have created a Delegate Approval preamble that the Delegate is required to agree with prior to accepting the application to this final next stage.

Rejecting the Application If the Reviewer selects the negative button it is mandatory to complete the comments section. Then select the Submit button. A dialogue box will appear asking for confirmation of the action. Select OK to Reject.
The Application is now Rejected.

If the application was Rejected in error, contact the Module Administrator to Unlock the application and Return to Applicant, The process will start from the beginning of the approval process again.

Accepting the Application If the Delegate accepts the application and will agree to the arrangement, select the positive response. It is not mandatory to enter a comment with a positive response.

Select the Submit button. A dialogue box will appear asking for confirmation of the action. Select OK to progress the application to next stage. A confirmation will appear that the application has been submitted.



The Application is now accepted and Finalised.

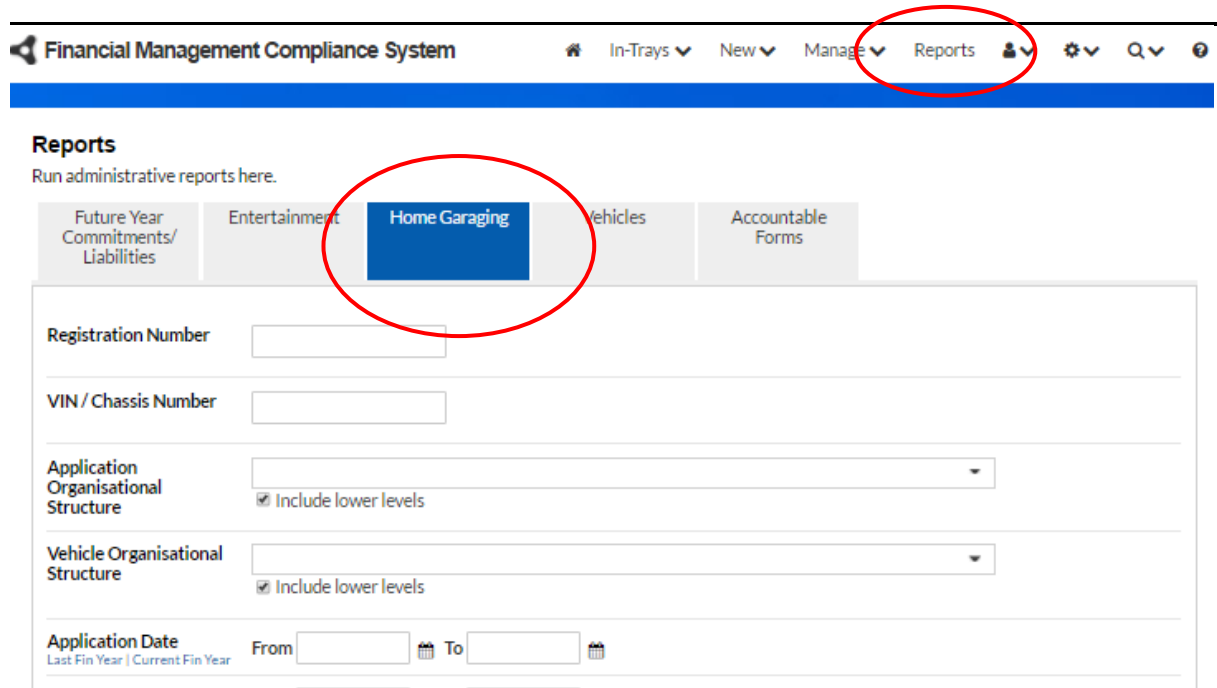
What happens Next?

Once the Delegate has submitted the application successfully, the interested parties may be informed of the final outcome, if the Module Administrator has enabled the workflow emails. The application will now be in the "Completed" section of the Applicant's In-Tray.

RUNNING HOME GARAGING REPORTS

Users with Reporting Permissions can generate Home Garaging Reports. The Module Administrator gives Reporting Permissions.

If you require Reporting Permission contact your Module Administrators.



- Go to the **Reports** Menu and select the **Home Garaging** Tab.

Note: only the tabs you have permission to use will be displayed.

Creating a Report

Filtering Options

All report criteria are cumulative and restrictive. The more you specify, the smaller the result you can expect to see. If you leave all fields blank – ALL records will appear in the report.

- **Registration Number** – Leave blank to report on all vehicles. Enter a registration number to restrict the report to one vehicle.
- **VIN/Chassis Number** – Leave blank to report on all vehicles. Enter a VIN/Chassis number to restrict the report to one vehicle.
- **Application Organisational Structure** – Leave blank to report on entire Organisational structure. Use the drop down arrow to restrict the report to a specific area of the Organisational Structure.


- **Include lower levels** – tick to include all lower levels in the organisation structure selected.
- **Application Date** – Leave blank to include all applications. Enter a date range to restrict the report to applications made in a specific period. Click on *Last Fin Year* or *Current Fin Year* text to quickly enter the dates for that entire financial year.
- **Arrangement Active** – Leave blank to include all arrangements past and present. Enter a date range to restrict the report to applications active in a specific period. Click on *Last Fin Year* or *Current Fin Year* text to quickly enter the dates for that entire financial year.
- **Security Type** – Leave blank to include all arrangements regardless of Security Type. To restrict the report to specific security types, select one, or more, Security Types.
- **Applicant** – Leave blank to include all applicants. Enter a name to restrict the report to one applicant.
- **Endorser** - Leave blank to include all Endorsers. Enter a name to restrict the report to one Endorser.
- **Delegate** - - Leave blank to include all Delegates. Enter a name to restrict the report to one Delegate.
- **Contribution** – Enter a financial range to restrict the report to those amounts.
- **Status** - Leave blank to include all arrangements regardless of Status. To restrict the report to specific status types, select one, or more.


Generating the Report

Once you have identified the criteria you wish to report on, click the **Report** button. The system will display the reported information in an interactive grid. Note: reports are often too large to display in entirety on a screen. Use the scroll bar at bottom and right side to shift the view.

Information can be **Grouped** by column by clicking on the column heading and dragging it above the column headings (as indicated on the screen). Undo the Grouping by dragging it back down into the column headings row.

Information in the columns can be sorted in the display by clicking the column heading. The direction of the sort can be changed by clicking on the arrow next to the column heading.

Filters can be applied to columns using  at the top of each column.


Individual applications can be viewed by clicking on the arrow  in the left column. Go back to the report by clicking the browser Back Arrow.

Select Columns/Show All Columns

Design your display to show only the columns you want to see. Click on the Select Columns text. A drop down box will appear showing all the possible columns. Click and Drag the columns you want from the drop down list and position them in the order you want in the



report table. Alternatively, click on the column you do not want displayed in the report table and drag it back to the drop down list to hide this column from the display.

To show all columns, click on the Show All Columns text. Use the scroll keys to move across the display. Change the order the columns are displayed in by clicking and dragging the column to a different order.

To undo any changes to the display of the report, or any filter applied, click on the  Reset Icon.

Exporting the report table

Once you have designed the report to display the information you require, it can be exported to either Adobe or Excel.

-  **Adobe Icon** – Exports the report to Adobe.
-  **Excel Icon** – Exports the report to Microsoft Excel

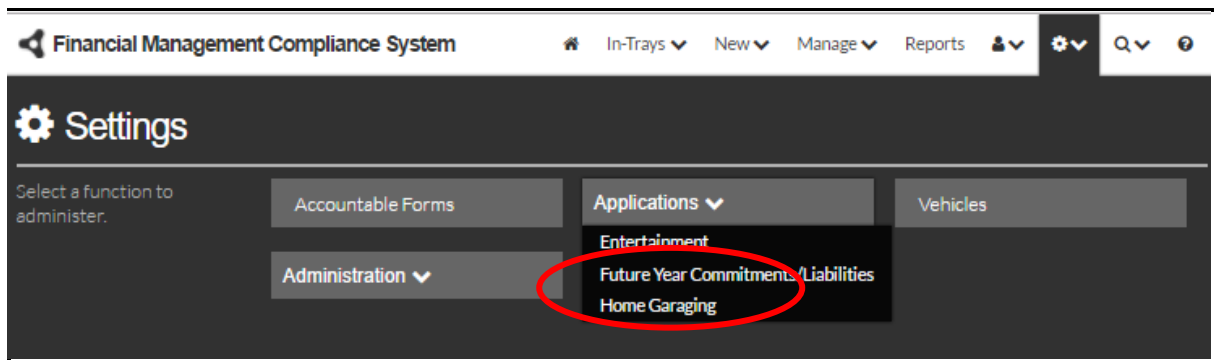
HOME GARAGING MODULE SETTINGS

The overall structure of the Home Garaging Application Form is predefined to maintain the logic and integrity of the FMCS system. However, much of the content of the Form and the approval workflow is configurable by the Home Garaging Module Administrators to suit each organisation's specific content and process requirements. FMCS is installed with initial settings that will suit most organisations.

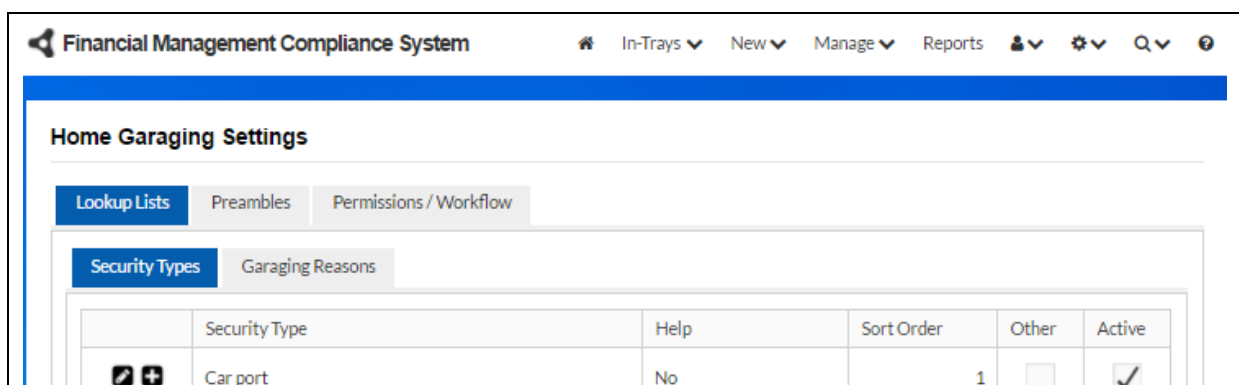
To configure the Home Garaging Module Settings you will need Module Administrator permission. Module Administrator permission is granted by the Systems Administrator or by another Module Administrator.

Note: Systems Administrators can also act a Module Administrator.

To configure the Home Garaging Module, and modify Applications option from the Systems Menu, then select Home Garaging.



A number of tabs are visible at the top of the Home Garaging Application Settings Screen to allow various areas of configuration.



Lookup Lists

Lookup lists give the Module Administrator the ability to design the Home Garaging Application Form with specific options relevant to their organisation.

There are two Lookup Lists: Security Type and Garaging Reasons.

Security Type

Security Types are a predefined list of options that refer to the type of garaging arrangement the car will be secured by under the application.

Security Types		Garaging Reasons			
	Security Type	Help	Sort Order	Other	Active
 	Car port	No	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
 	Lockable garage	No	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
 	Lockable gates	Yes	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>
 	Other	No	4	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

To modify an existing Security Type, click on the pencil icon. To add a new security type, click on the add icon.

Editing Fields

Security Type		Help Text	
Security Type	<input type="text" value="Car port"/>		
Other	<input type="checkbox"/>	Indicates this option requires applicant to enter 'Other' text	
Active	<input checked="" type="checkbox"/>	Indicates this option as available for selection when submitting an application	
Sort Order	<input type="text" value="1"/>		










1. Give the security type a name.
2. Ticking "Other" will require the applicant to enter further text information if this option is selected.
3. Ticking "Active" will mean this option will be displayed on the Application Form. If this field is not selected – or deselected – this option will no longer be displayed on the form and be available for use.
4. Use the Sort Order to arrange which order this option will appear in the Application Form.
5. Click on the tick item to save.

Help Text

Help text can be added to this item by clicking on the Help Text tab. This function can be used to provide additional information to the applicant regarding this item. It will appear as a small icon next to the item on the form. If clicked on, the information contained will be displayed. Help text can be formatted in many different styles and may include hyperlinks to further information on the intra, or internet. The Help Text can be viewed in Design, HTML or Preview modes. Click on the tick icon to save any information entered.

Garaging Reasons

Garaging Reasons are a predefined list of options for why the applicant is proposing a Home Garaging arrangement.

Security Types		Garaging Reasons			
	Garaging Reason	Help	Sort Order	Other	Active
 	Vehicle is required for out-of-hours business purposes and it is not practical, efficient or possible to return the vehicle to its 'normal' office garage location on the day of use.	No	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
 	The vehicle is required by the department official on the following business day for business purposes and it would be inefficient for the vehicle to be collected from its office garage location. This includes where there is a need for an early start of late return in relation to a trip away from the usual place of work.	No	2	<input type="checkbox"/>	<input checked="" type="checkbox"/>
  	Blanket approval - Vehicle is required for a regular out-of-hours business purpose and it is not practical, efficient or possible to return the vehicle to its 'normal' office garage location on the day of use.	Yes	3	<input type="checkbox"/>	<input checked="" type="checkbox"/>
 	Blanket approval - the vehicle is required by the department official on the following business day for business purposes and it would be inefficient for the vehicle to be collected from its office garage location. This includes where there is a need for an early start of late return in relation to a trip away from the usual place of work.	Yes	4	<input type="checkbox"/>	<input checked="" type="checkbox"/>

To modify an existing Security Type, click on the pencil icon. To add a new security type, click on the add icon.

Editing Fields

Garaging Reason	Help Text
Garaging Reason	<input type="text" value="Vehicle is required for out-of-hours business purposes and it is not practical, efficient or possible to return the vehicle to its 'normal' office garage location on the day of use."/>
Other	<input type="checkbox"/> Indicates this option requires applicant to enter 'Other' text
Active	<input checked="" type="checkbox"/> Indicates this option as available for selection when submitting an application
Sort Order	<input type="text" value="1"/>

1. Enter a description of the Garaging Reason.

2. Ticking "Other" will require the applicant to enter further text information if this option is selected. Ticking "Other" also allows Module Administrators to use the Admin Review and Endorser Review steps of the approval process for this garaging reason.
3. Ticking "Active" will mean this option will be displayed on the Application Form. If this field is not selected – or deselected – this option will no longer be displayed on the form and be available for use.
4. Use the Sort Order to arrange which order this option will appear in the Application Form.
5. Click on the tick item to save.

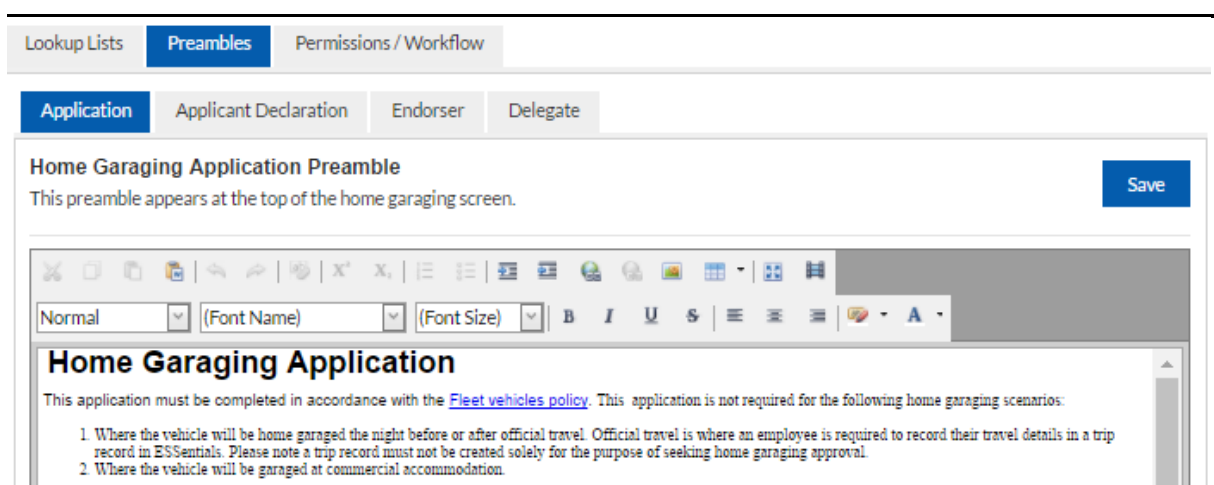
Help Text

Help text can be added to this item by clicking on the Help Text tab. This function can be used to provide addition information to the applicant regarding this item. It will appear as a small icon next to the item on the form. If clicked on, the information contained will be displayed. Help text can be formatted in many different styles and may include hyperlinks to further information on the intra, or internet. The Help Text can be viewed in Design, HTML or Preview modes. Click on the tick icon to save any information entered.

Preambles

Preambles allow the Module Administrators to write introductory texts and declarations to suit their organisation's policies and practices.

There are four Preambles that can be edited. Preambles can be formatted in many different styles and may include hyperlinks to further information on the intra, or internet. The preamble can be viewed in Design, HTML or Preview modes. Click on the Save button to save any information entered.



Lookup Lists | **Preambles** | Permissions / Workflow

Application | Applicant Declaration | Endorser | Delegate

Home Garaging Application Preamble Save

This preamble appears at the top of the home garaging screen.

Normal (Font Name) (Font Size) **B** *I* U ~~S~~ | [List Bullets] | [List Numbers] | [Link] | [Image] | [Color] | [Background Color]

Home Garaging Application

This application must be completed in accordance with the [Fleet vehicles policy](#). This application is not required for the following home garaging scenarios:

1. Where the vehicle will be home garaged the night before or after official travel. Official travel is where an employee is required to record their travel details in a trip record in ESSentials. Please note a trip record must not be created solely for the purpose of seeking home garaging approval.
2. Where the vehicle will be garaged at commercial accommodation.

Application Preamble

This preamble appears at the top of the Home Garaging screen.

Applicant Preamble

This is the declaration that an Applicant must agree to when lodging and application for a Home Garaging arrangement.

Endorser Preamble

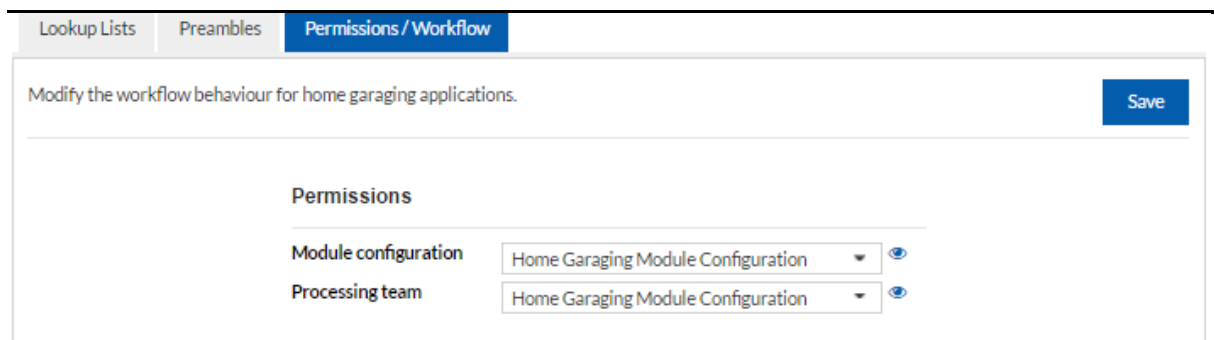
This declaration appears on the application form when an application is sent to the Endorser for approval.

Delegate Preamble

This declaration appears on the application form when an application is sent to the Delegate for approval.

Permissions / Workflow

Select the Permission/Workflow to tab to set up groups who will have permission to manage the module.



Lookup Lists Preambles **Permissions / Workflow**

Modify the workflow behaviour for home garaging applications. Save

Permissions

Module configuration Home Garaging Module Configuration

Processing team Home Garaging Module Configuration

Module Configuration

This allows groups of users to be given permission to be Module Administrators and to configure the Home Garaging Module. Module administrators are those users who are members of the group selected in the Module configuration field. Select from the dropdown list.

Select the view icon to view the members of the selected group.

See FMCS Guide - System Administration & Global Settings for further information about configuring groups.

Processing Team

The processing team are the group of users who perform the Admin Review of an application should that step be required in a Home Garaging arrangement.

Select the group from the dropdown list.

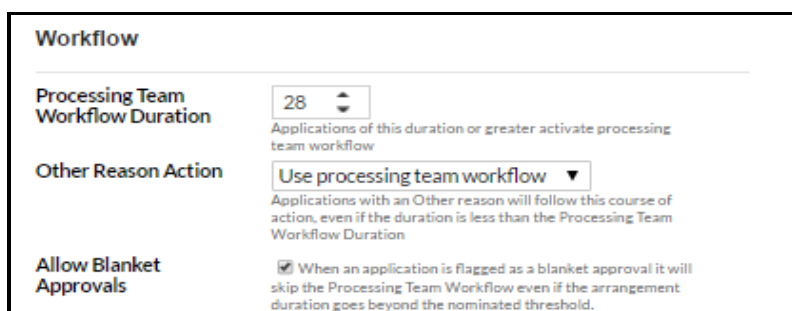
Select the view icon to view the members of the selected group.

See the Group Configuration Section for further information about configuring groups.

Default Delegate

If checked, the approval delegate and endorser (if required) will default to the applicant's supervisor.

Workflow



The screenshot shows a 'Workflow' settings panel with three main sections:

- Processing Team Workflow Duration:** A numeric input field set to '28'. Below it, a description reads: 'Applications of this duration or greater activate processing team workflow'.
- Other Reason Action:** A dropdown menu currently showing 'Use processing team workflow'. Below it, a description reads: 'Applications with an Other reason will follow this course of action, even if the duration is less than the Processing Team Workflow Duration'.
- Allow Blanket Approvals:** A checkbox that is checked. Below it, a description reads: 'When an application is flagged as a blanket approval it will skip the Processing Team Workflow even if the arrangement duration goes beyond the nominated threshold.'

In this section of the Settings, Module Administrators define when the work should include the Administrative Review and Endorser Steps of the approval process.

1. Processing Team Workflow Duration – enter the maximum amount of days allowed before the workflow is required to have Administrative Review and Endorser Approval added.
2. Any reason for home garaging in the Lookup List (see earlier this chapter) can be flagged as "Other" which will require the applicant to enter further information and triggers this optional workflow.
The Administrators can choose one of three options from the drop down list.
 - a) No processing Team Notification – meaning that no Endorser Approval will be added to the workflow.
 - b) Notify Processing Team – meaning no Endorser Approval workflow will be triggered, but the Processing Team will be notified to allow them to monitor the arrangement.
 - c) Use Processing Team Workflow – meaning Endorser Approval will be added to the workflow of all reasons flagged as "Other".
3. Allow Blanket Approvals – if ticked, it means any application that has been marked as a Blanket Approval will not trigger the Endorser Approval step even if the duration of the arrangement is longer than the Processing Team Workflow Duration limit.

Email Notifications

All email notifications can be edited or turned off. To turn off the email notification for a step, untick the item. To edit the email content click on the "edit" text. Edit the email as required. Notice there are a number of merge fields that can be added by simply using the drop down box at the bottom of the email box and selected. Click on the Save button to save any change.

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