

Slide 1



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# Welcome to the FMCS Users Group

9TH APRIL 2019

Slide 2

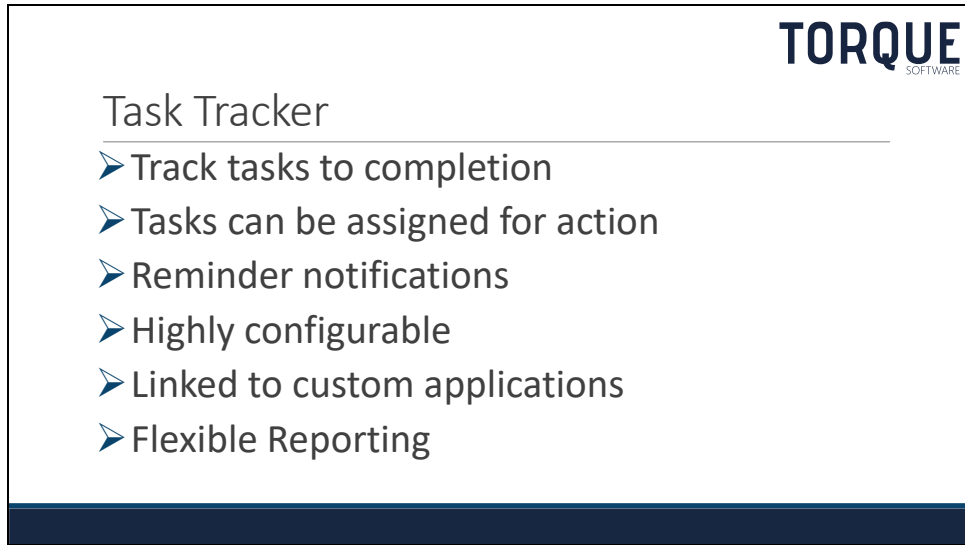


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## Agenda

- 1) Task Tracking module demonstration (Steve Winning, Torque Software)
- 2) Risk module demonstration (Steve Winning, Torque Software)
- 3) Case Study – Work Health and Safety System implementation (Ralph Schwarz, DHS)
- 4) Case Study – Labour Hire System implementation (Peter Mitchell, DHS)
- 5) Customisable Application module enhancements (Steve Winning, Torque Software)
- 6) Case Study – Custom Application Examples (Daniel Brooker, Agriculture)
- 7) Other recent enhancements (Steve Winning, Torque Software)
- 8) Tips and Techniques (Steve Winning, Torque Software)
- 9) Questions and Feedback

Slide 3

A presentation slide with a white background and a dark blue footer bar. The TORQUE SOFTWARE logo is in the top right corner. The title 'Task Tracker' is centered and underlined. Below the title is a bulleted list of six features.

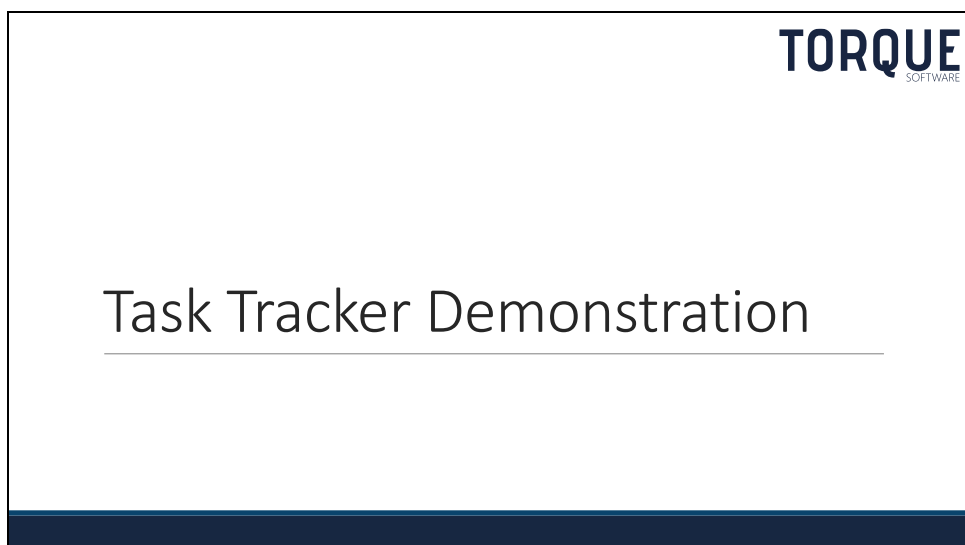
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## Task Tracker

- Track tasks to completion
- Tasks can be assigned for action
- Reminder notifications
- Highly configurable
- Linked to custom applications
- Flexible Reporting


Task tracker is a new module allowing almost any task to be assigned for action and tracked until completion. Includes reminder notifications and uses the report builder for flexible reporting.

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A presentation slide with a white background and a dark blue footer bar. The TORQUE SOFTWARE logo is in the top right corner. The title 'Task Tracker Demonstration' is centered and underlined.

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## Task Tracker Demonstration




Risk Management Module

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- Comprehensive risk information
- Scheduled reviews
- Review notifications and reminders
- Workflow to risk owner

The risk management module allows management of enterprise and strategic risk. Risk reviews can be scheduled based on the level of risk. Notifications are sent when reviews are due and reminders when overdue.

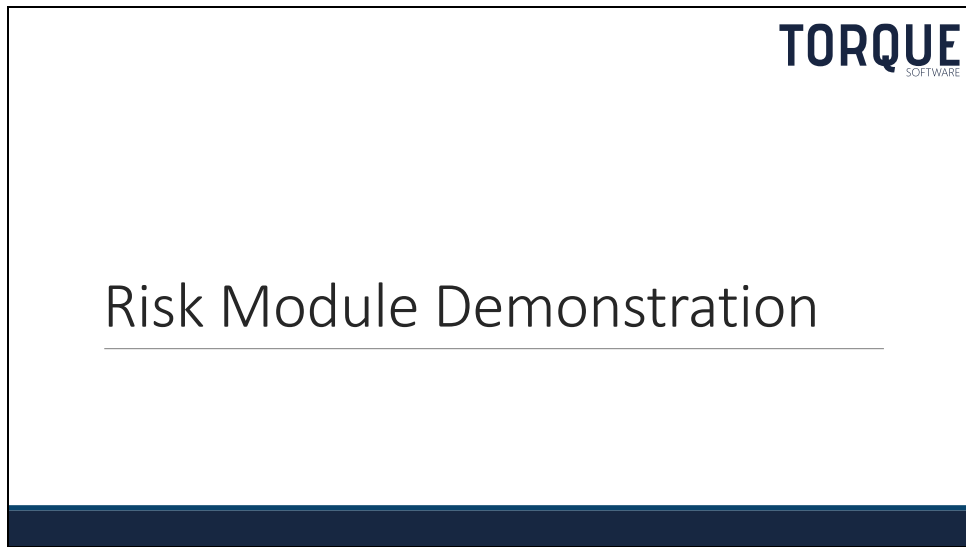


Risk Management Module

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- Comprehensive permissions
- Configurable reports
- Dashboard type reports
- Simple implementation

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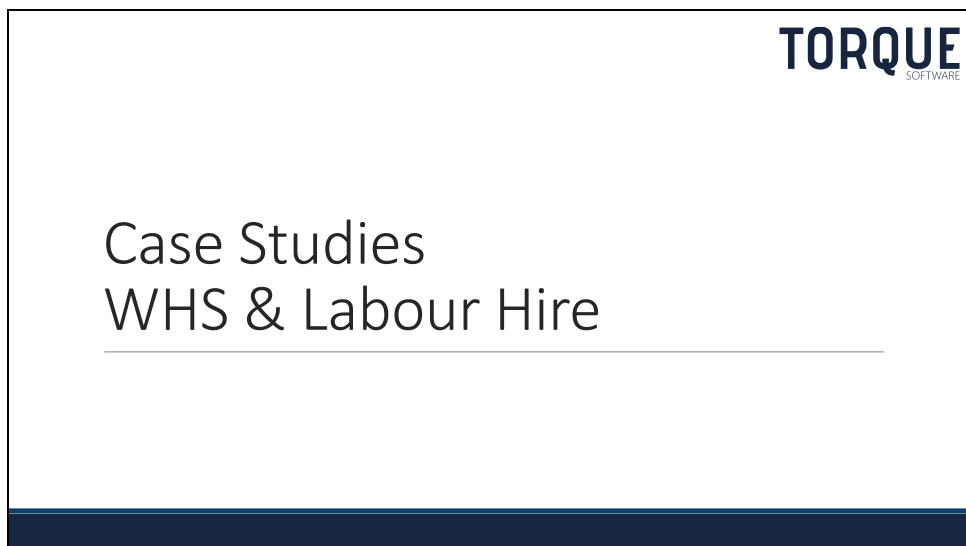


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Risk Module Demonstration

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Case Studies  
WHS & Labour Hire

This slide features the TORQUE SOFTWARE logo in the top right corner. The main content is the text "Case Studies" and "WHS & Labour Hire" centered on the slide, underlined. A dark blue horizontal bar is located at the bottom of the slide.

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# Custom Application Enhancements

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## Delegation Types now “Authorities”

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**Authority Management**

Authorities Authoriser Questions - Master

Name	Statutory	Specify Limits	Default To Supervisor	Workflow Step	No. of Questions
Alcohol	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	1	1

Name

Authority type  Statutory Delegation  Other

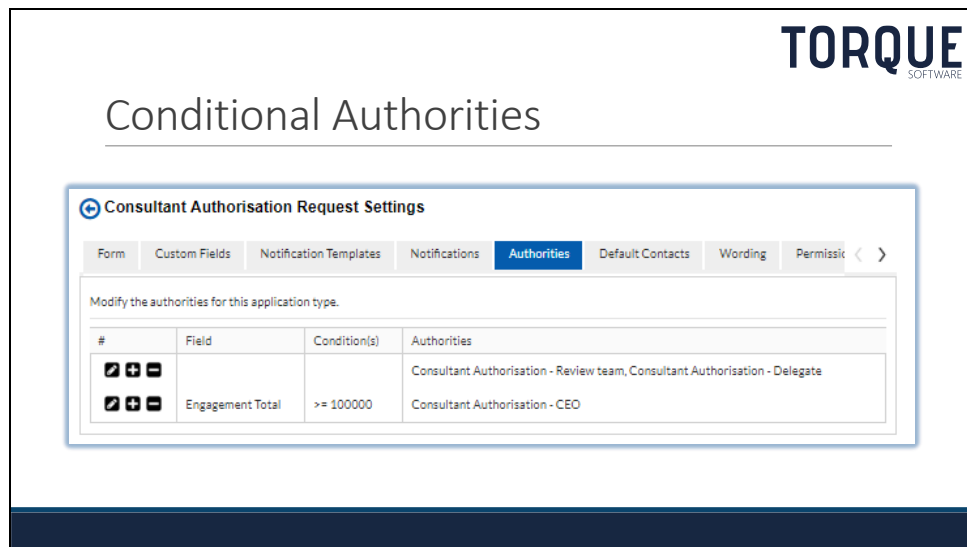
Delegation Types have now been renamed to “Authorities” in recognition of how delegation types are now being used to configure many different types of workflow reviews, many of which are not necessarily delegations.

Authorities now include an Authority Type which indicates if the authority is a statutory delegation.

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The screenshot displays the TORQUE SOFTWARE interface. At the top right is the logo 'TORQUE SOFTWARE'. The main heading is 'Definable Actions'. Below this, there are two input fields: 'Authorised Label' with the value 'Accepted' and 'Not Authorised Label' with the value 'Not Accepted'. Below these is a 'Review Outcome' dialog box. The dialog box contains a question: 'Does the Consultant Authorisation Request meet the requirements of the review team?' with radio buttons for 'Yes' and 'No'. To the right is a text area for comments: 'Please enter any relevant comments'. Below the text area, the 'Outcome' is set to 'Accepted' (indicated by a red circle), with 'Not Accepted' as an alternative. At the bottom, there is a date field for 'Outcome decision date' with a 'select today' button.

Previously the actions available when a delegate was reviewing an application was fixed to "Approve" and "Not Approve". However, these sometimes did not make sense depending on the type of review being performed. The outcomes are now configurable.



Authorities may now be included conditionally in custom applications. This means an authority can be included depending upon responses in the application.

This function is now available in the Authorities tab in custom application configuration.

Configuration of unconditional authorities have also been moved to the Authorities tab.

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## Notification Configuration

**Consultant Authorisation Request Settings**

Form Custom Fields Notification Templates **Notifications** Authorities Default Contacts Wording Permissic < >

#	Event	Notify	Rekurs	Template	Active
	Consultant Authorisation Request Amended	Additional Contacts (role); Delegates - Reviewed (role); Subject Person (role)	Does not recur	Approval Amended	<input checked="" type="checkbox"/>
	Consultant Authorisation Request Approved	Additional Contacts (role); Delegates - Reviewed (role); Subject Person (role)	Does not recur	Proposal Approved	<input checked="" type="checkbox"/>

Notifications now may be configured. Previously custom application notifications were predefined and could not be modified to meet specific requirements.

Now, both the template used to format the email notification and also when a notification is sent is configurable. Recurring notifications are also available, allowing for regular reminders to be configured.



The screenshot displays the TORQUE SOFTWARE interface. At the top right is the TORQUE SOFTWARE logo. The main heading is "Notification Merge Fields". Below this is a configuration box for "Include in Emails" with a checked checkbox and the text "Indicates this field will appear as a merged item in notification emails". Below the configuration is a preview of a notification email titled "Financial Management Compliance System". The email content includes: "The item below has been reallocated to User One by Steve Jones:", "Reference: 60287", "Type Consultant Authorisation Request", "Detail Steve Jones", "Nature of the request: New Engagement", "Total engagement amount \$: 59500", and "Consulting firm name: Hays Recruitment". A red oval highlights the last three lines of the email content.

Custom field configuration now has an option to “Include in Emails”. If this is set then the custom field will be displayed at the bottom of all notification emails.

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## Import/Export Custom App Config

**Application Type Management**

Corrective Actions Report	Action ▼
Gift/Benefit Provided to Staff/External Party	Action ▼
Request for Payment/Purchase by Credit Card	Action ▼
Request to Access DHS Uber Business Account	Action ▼

Create New Application Type

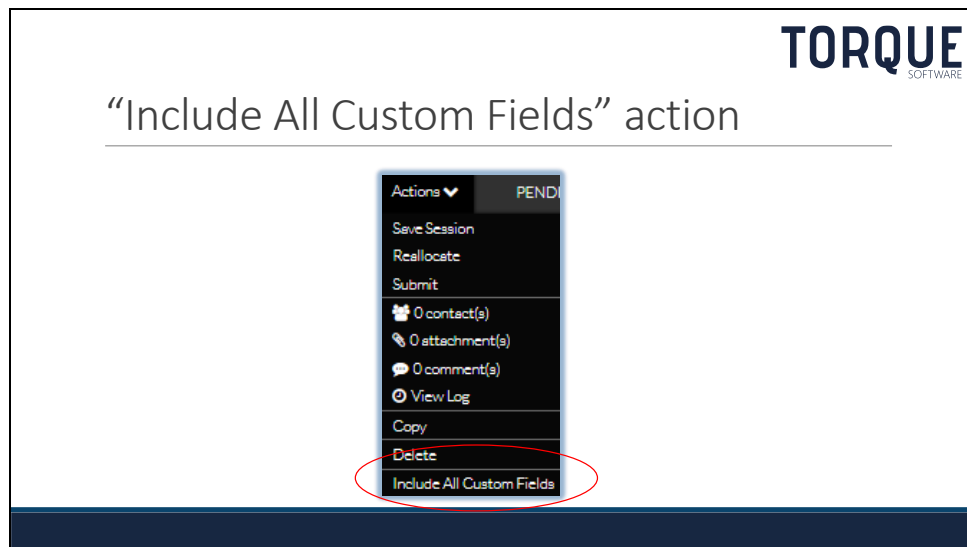
Export Application Types

Import Application Types

Type to filter application type list

Include inactive

Custom application configuration may now be exported/imported from test to production.



When a new application is created, only the active custom fields available at that time are included in the form. This means that older applications that have been completed, will not include custom fields configured after the application was created.

The Include All Custom Fields action will load all custom fields into the currently displayed application. This action also updates any lookup lists to the current values.

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## New Risk Level Answer Type

Threat					Opportunity				
	Minor	Moderate	Major	Extreme	Outstanding	Major	Moderate	Minor	
Frequent/Almost Certain	Medium (7)	High (11)	Very High (14)	Very High (16)	Frequent/Almost Certain	Very High (16)	Very High (14)	Medium (7)	
Likely	Low (4)	Medium (8)	High (12)	Very High (15)	Likely	Very High (15)	High (12)	Low (4)	
Possible	Low (2)	Medium (5)	High (9)	High (13)	Possible	High (13)	High (9)	Low (2)	
Unlikely	Low (1)	Low (3)	Medium (6)	High (10)	Unlikely	High (10)	Low (3)	Low (1)	

Risk (required) **12 High (Threat)**  
% Likely Major Deputy Secretary  
⊖ Undesirable ⊕ Addressed as a matter of urgency.

A new answer type is now available to enter a risk level.

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## Report Builder for Custom Apps

Create New Report

Type:  Tabulated  Pivot Grid

Data:

- Corrective Actions Reports
- Gifts/Benefits Provided to Staff/External Party
- Non-Compliance Report
- Non-Compliance Requirement
- Requests for Payment/Purchase by Credit Card
- Requests to Access DHS Uber Business Account

The report builder is now available for custom applications. This means sophisticated and flexible reports can now be developed for all information contained in custom applications.

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Future Enhancements

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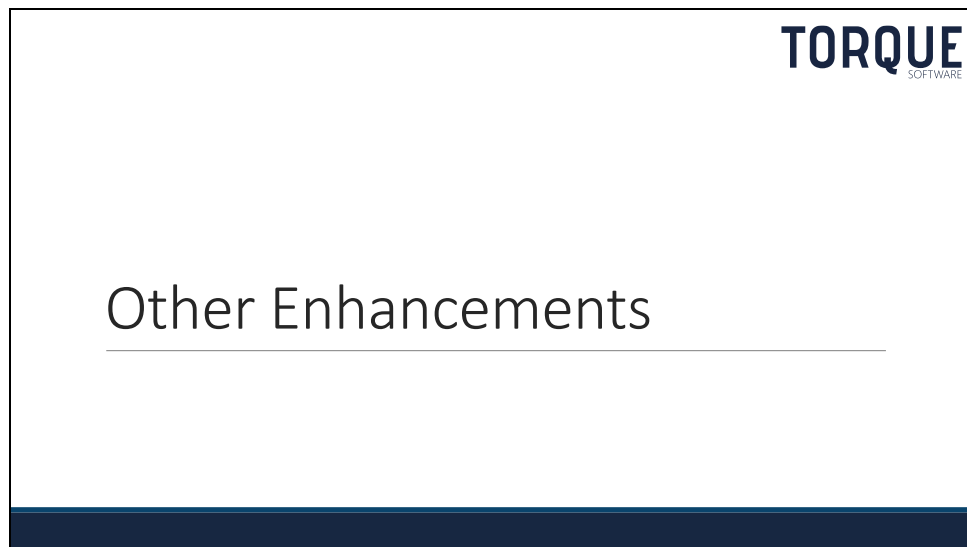
- Workflow to groups
- Allow data entry by the authoriser
- Field level permissions
- Expanded answer types

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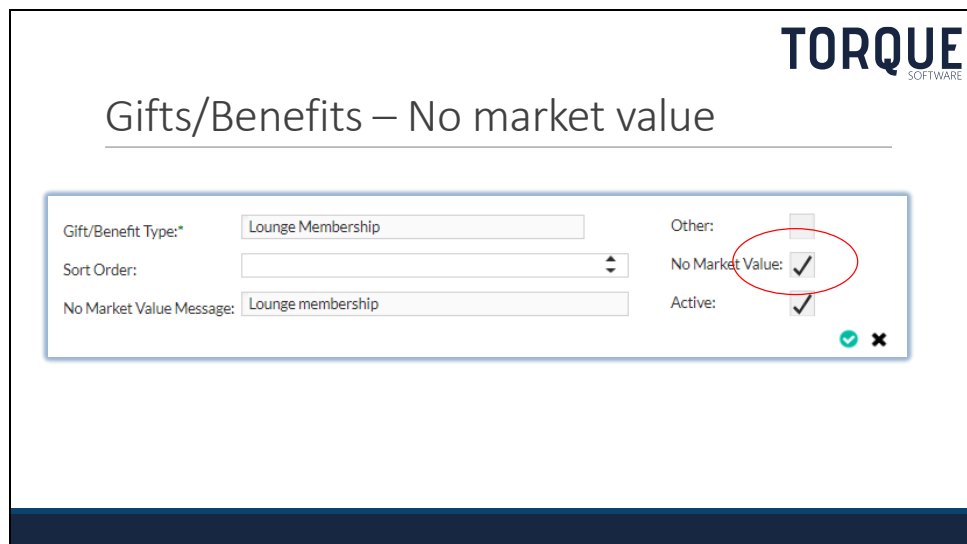
Case Study  
Custom Forms

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Gift/Benefit types can now be configured as having no market value. When this type is selected, the questions about gift/benefit value are not displayed.

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## Entertainment – Workflow order

**Workflow**

Stage/Event	Workflow Enabled	Workflow Order	Notify	Template
<b>Application</b>				
Application reset to draft - notify applicant	<input checked="" type="radio"/> Yes <input type="radio"/> No		<input checked="" type="radio"/> Yes <input type="radio"/> No	<a href="#">Edit</a>
Admin review workflow	<input type="radio"/> Yes <input checked="" type="radio"/> No	3 ▼	<input checked="" type="radio"/> Yes <input type="radio"/> No	<a href="#">Edit</a>
Alcohol approval	<input checked="" type="radio"/> Yes <input type="radio"/> No	2 ▼	<input checked="" type="radio"/> Yes <input type="radio"/> No	<a href="#">Edit</a>
Spending approval	<input checked="" type="radio"/> Yes <input type="radio"/> No	1 ▼	<input checked="" type="radio"/> Yes <input type="radio"/> No	<a href="#">Edit</a>
Complete - notify applicant	<input checked="" type="radio"/> Yes <input type="radio"/> No		<input checked="" type="radio"/> Yes <input type="radio"/> No	<a href="#">Edit</a>

The order of workflow for admin review, alcohol approval and spending approval is now configurable. For example, the admin review step can now be configured to occur after spending approval.

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## Entertainment – Reconciliation review

**Reconciliation**

Required - notify processing team	<input checked="" type="radio"/> Yes <input type="radio"/> No	<a href="#">Edit</a>
Due - notify applicant	<input checked="" type="radio"/> Yes <input type="radio"/> No	<a href="#">Edit</a>
Reapproval required - notify spending approver	<input checked="" type="radio"/> Yes <input type="radio"/> No	<a href="#">Edit</a>
<del>Outcome - notify applicant</del>	<del><input checked="" type="radio"/> Yes <input type="radio"/> No</del>	<del><a href="#">Edit</a></del>
Outcome - notify processing team	<input type="radio"/> Yes <input checked="" type="radio"/> No	<a href="#">Edit</a>

A notification may now be sent to the processing team when an entertainment review is complete.



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## FBT Override

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**Spending Approval**

Spending Approver

Application Type

FBT  FBT  Non-FBT

GL Code

The FBT liability indicator in Entertainment may now be overridden explicitly by module administrators. Previously FBT override was achieved by selecting a FBT/Non FBT GL Code. However, this caused problems when the same GL Code was being used for both FBT and Non FBT.

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## Tips & Techniques

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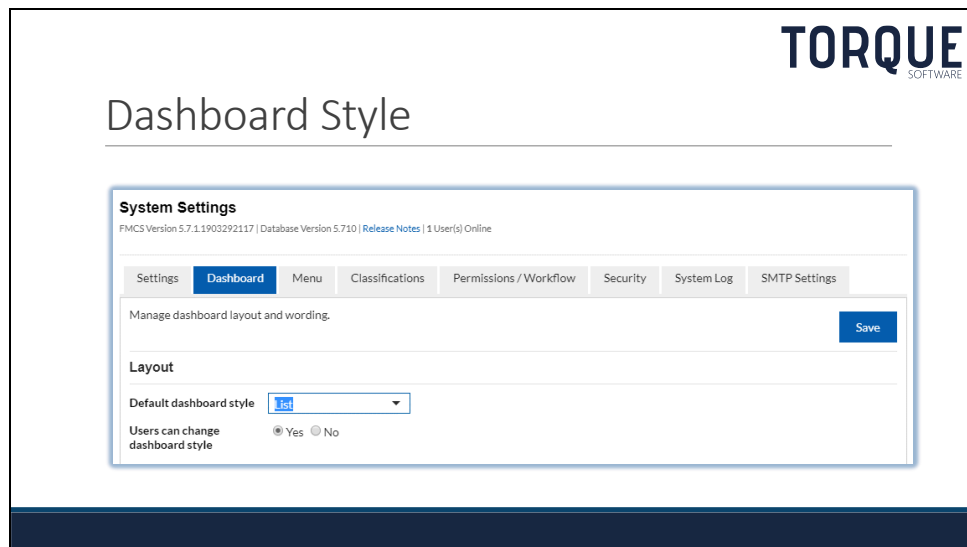
## Authority Candidate Groups

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	Candidate Authorisers Group	Max Threshold	Unlimited
<input checked="" type="checkbox"/>	Everyone	\$5,000	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Delegate - General Expenditure - \$250,000	\$250,000	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Delegate - General Expenditure - \$1m	\$1,000,000	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Delegate - General Expenditure - \$5m	\$5,000,000	<input type="checkbox"/>
<input checked="" type="checkbox"/>	Delegate - General Expenditure - Unlimited		<input checked="" type="checkbox"/>

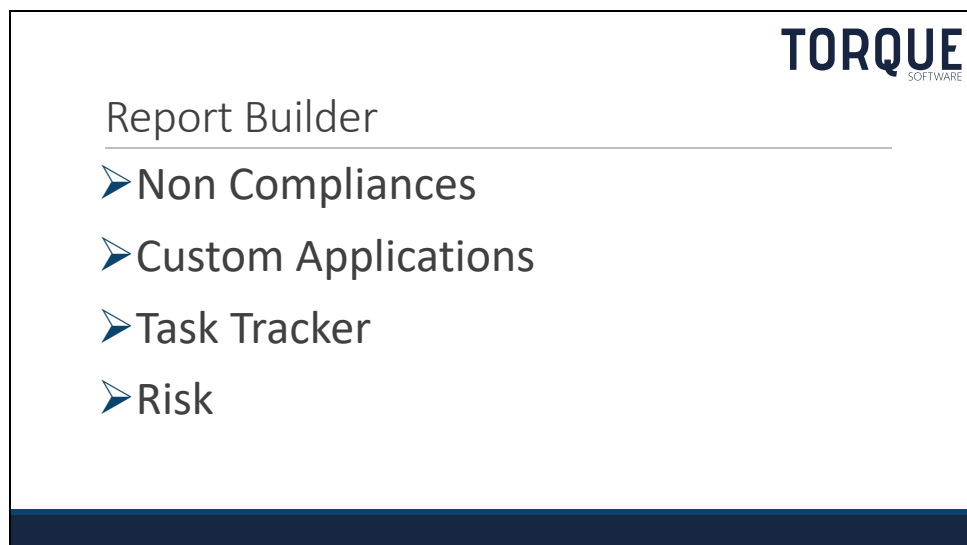
A reminder that the members of a group selected as the candidates for an authority do not necessarily have that authority. Sometimes when there are large numbers of users who have an authority it is not practical to maintain a group with the users who actually have the authority. In this example, selecting the everyone group does not mean everyone has the authority. It only allows the user submitting the application to select the delegate from all users. In this situation it is up to the applicant and the selected delegate to ensure they have the required delegation.

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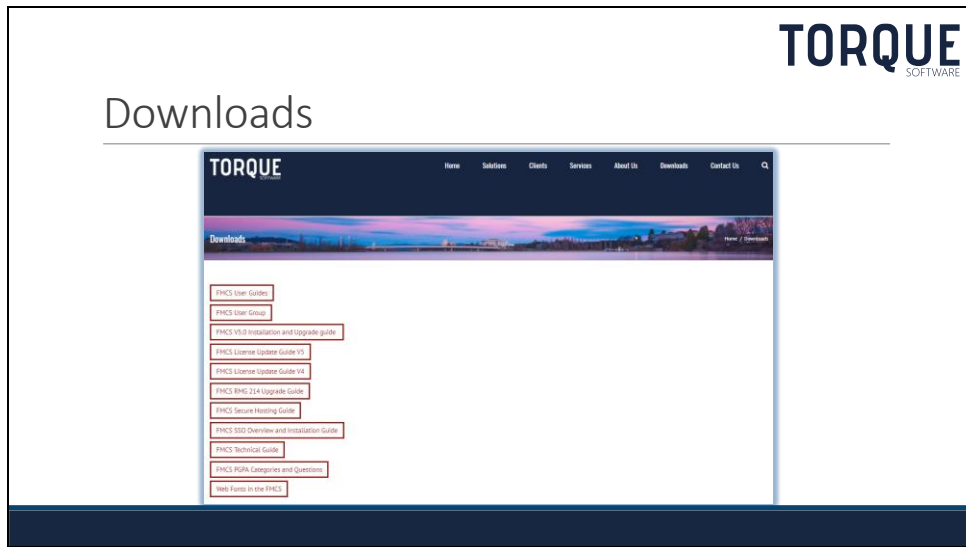


Users may be given the option to select from either the tile or list dashboard styles. The list style dashboard is useful where the number of tiles becomes cumbersome.

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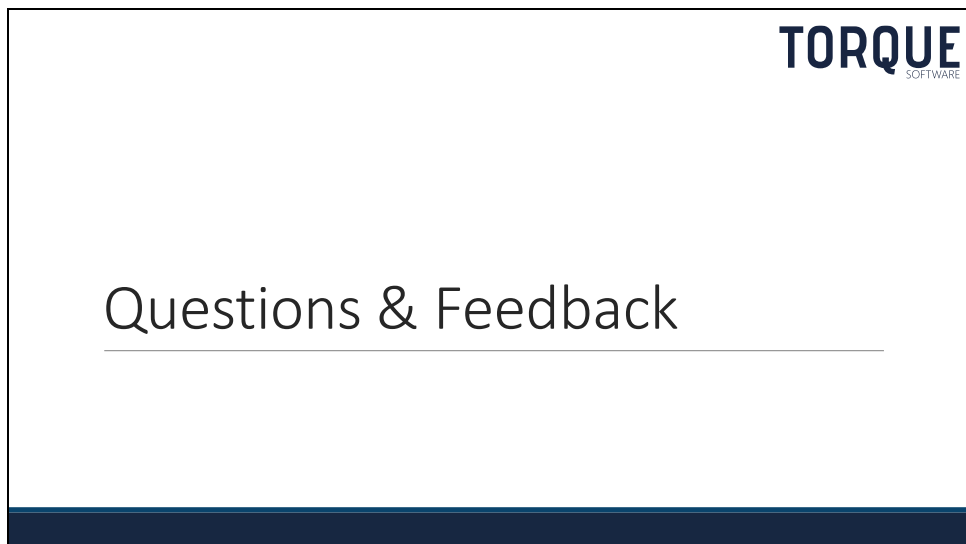
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The screenshot shows the TORQUE Software website's Downloads page. The page features a dark blue header with the TORQUE SOFTWARE logo in the top right corner. Below the header, the word "Downloads" is prominently displayed. A navigation menu includes links for Home, Solutions, Clients, Services, About Us, Downloads, and Contact Us. The main content area lists several download items, each with a red box highlighting the text:

- FMCS User Guides
- FMCS User Group
- FMCS V5.0 Installation and Upgrade guide
- FMCS License Update Guide V5
- FMCS License Update Guide V4
- FMCS RMC 2EA Upgrade Guide
- FMCS Secure Hosting Guide
- FMCS TSD Overview and Installation Guide
- FMCS Technical Guide
- FMCS PDR Categories and Questions
- Web Forms in the FMCS

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The screenshot shows the TORQUE Software website's Questions & Feedback page. The page features a dark blue header with the TORQUE SOFTWARE logo in the top right corner. Below the header, the text "Questions & Feedback" is prominently displayed. A horizontal line is positioned below the text. The bottom of the page is a solid dark blue bar.