TORQUE
SOFTWARE

LIGHTHOUSE USER GUIDE

Customisable Applications

Version 5.10.0

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INTRODUCTION

The customisable applications module is a highly flexible and powerful tool which allows electronic application templates to be configured by the system administrator to meet the policies and procedures of an organisation. Any number of application templates can be created. Users can then create applications using the templates. Any number of applications can be created from a template.

Application templates include several configuration options to allow many different types of applications to be created. Configuration options include;

- Any number of fields to collect all the information required. Some fields are pre-defined and selectable as required. Custom fields are also available which can be configured to meet specific requirements.
- Workflow to authorisers for review. An authoriser may be a delegate or a person with the authority to decide an outcome.
- Workflow to payment managers for purchasing/payment.

Examples of application templates currently in use include;

- Request to Access Uber Business Account
- Request for Payment/Purchase by Credit Card
- Gifts/benefits to staff/External Party
- Invoice Payment Request
- Domestic Travel Request
- International Travel Request
- Reimbursement Claim
- Purchase Request
- Declaration of Interests

Benefits

- ✓ Applications can be quickly configured and implemented as new requirements arise.
- ✓ Comprehensive record the outcome decided by authorisers.
- ✓ Electronic workflow.
- ✓ Intuitive and easy to use.
- ✓ Determines and enforces delegations required based on type of spending and amount (hard control).
- ✓ Enterprise-wide reporting of all applications.

Customisable Application Users

The customisable applications module includes some special terminology to describe the users who are involved with an application.

Allocated Person is the person responsible for completing a workflow stage. The application appears in the "to action" in-tray of the allocated person.

Subject Person is the person the application is about (e.g. traveller in a travel request). Inclusion of a subject person in an application template is optional.

Interested party is anyone recorded against an application. Includes additional contacts, subject person, submitter of the application, all authorisers, payment managers. An application appears in the "in progress" or "complete" in-tray of all interested parties, except when they are the allocated person.

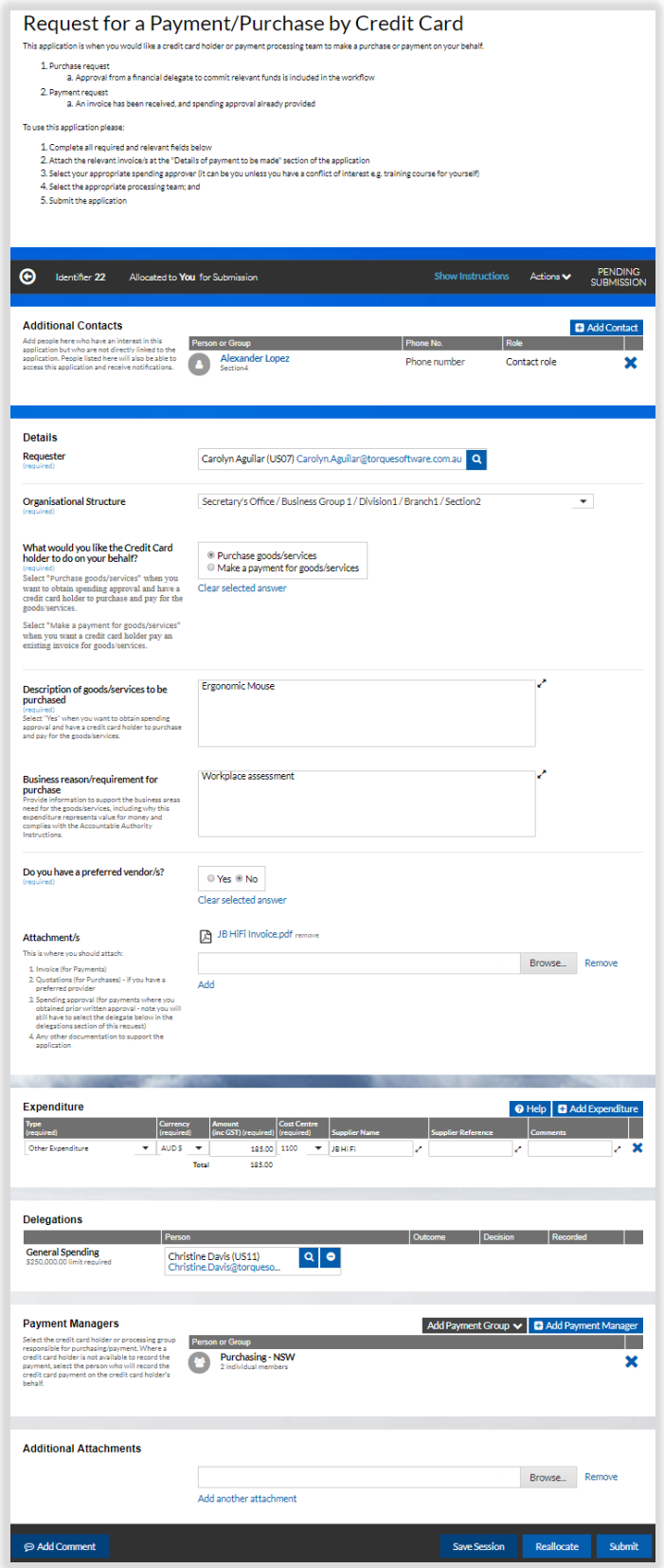
Payment Manager is the person(s) or group(s) responsible for purchasing and/or making payment as a result of an approved application.

Processing Team is the group of people responsible for overseeing all applications using the same application template. The processing team have special permissions allowing them to view and perform actions on applications.

APPLICATION SECTIONS

Applications have several sections for the entry or display of information. The sections available depend on the configuration and the application status.

The example below shows a typical application created from an application template. The example includes the most significant configurable sections. The example application is in the submission stage which is the first stage of any application.



Preamble Section – Configurable text

Orientation Section

Additional Contacts Section

Details Section – Includes both predefined and custom fields.

Expenditure Section – Optional section when spending authorising is required.

Authorities Section – Optional section when workflow to authorisers is required.

Payment Section – Optional section when purchase/payment workflow required.

Attachments Section

Action Button Section

Preamble Section

The preamble section is used to provide information about the purpose of the application and how it should be used. The contents are completely configurable and can contain any html such as text, images and intranet/internet links.

Orientation Section

The orientation section displays useful information about the status of the application. The orientation section is not configurable. Information includes the following;

Identifier – System generated unique identifier for the application. The first part of the identifier is the Application Reference. The Application Reference is suffixed with an Amendment Number for amendments.

Allocation Information – Displays who is currently allocated to perform the next workflow stage and who performed the allocation (if applicable).

Actions – Drop down list of all available actions. The available actions depend on the permissions of the current user and the status of the application. Actions include the following;

> **Amend** – Allows a completed application to be amended. Creates a copy of the application and increments the Amendment Number.
>
> **Attachments** – Scrolls the screen to the attachments section.
>
> **Comments** – Allows adding/viewing comments.
>
> **Contacts** – Scrolls the screen to the additional contacts section.
>
> **Copy** – Creates a new application based on a copy of the current application.
>
> **Create New** – Creates a new application of the same type.
>
> **Delete** – Deletes the application. Applications that have not yet been submitted will be deleted permanently. Applications that have been submitted, at any time, will be flagged as deleted and only retrievable by selecting the Deleted status in Customisable Applications reports. Only the processing team or the current allocated user may delete and application.
>
> **Include All Custom Fields** – Inserts any new custom fields configured since the application was created. Note: An application will only contain the custom fields active when the application was first created. Optionally, custom fields made inactive since the application was created may also be removed using this action. This action is only available when the application is editable and new custom fields are available.
>
> Also updates the values of lookup list items to the current values.

Next Pending – Selects the next application in the user's action in-tray.

Payment – Shows the payments related to the application.

Reallocate - Reallocates the form to an individual user of group to perform the current workflow stage. If a group is selected, any member of the group may perform the current workflow stage.

Return – Returns the application to a previous workflow stage.

Save Session - Saves the current application values.

Submit – Submits the application to the next workflow stage. Data validation is performed when submitting.

View Log – Displays the log records

Unlock – Allows the application to be unlocked for editing at the completion and superseded stages.

Warning: While the edit action is logged, the individual changes are not logged. It is recommended the application be returned to a previous reviewer if changes are required. If this is not the preferred option, then ensure any changes made are recorded in the comments.

Outcome – Shows the outcome for applications with a status of complete or superseded. Outcome is Approved or Not Approved.

Show Instructions – Link to instructions to assist the allocated user when performing the current workflow stage. Instructions are configured by the system administrator and are optional.

Status – The status of the application. The following statuses apply;

Pending Submission – In the submission stage and waiting to be submitted by the allocated person.

Pending Review – In the review stage and waiting to be reviewed by one or more authorisers. This status provides a pop up at the bottom of the screen allowing the authoriser to authorise/not authorise the application.

Complete – All stages complete, and no further action required.

Superseded – The Application has been amended and the amendment has been approved. Note: not approved amendments do not cause an application to be superseded.

Deleted – Application has been deleted.

Additional Contacts Section

The additional contacts section allows users who are not directly linked to the application to be noted as interested in the application. Additional contacts are also able to access the application and receive notifications. The following actions are available;

Add Contact – Add an additional contact.

Save Contacts – Allows the additional contacts to be saved. Useful when the current user wishes to save the contacts but does not have access to the save the whole application.

Delete Contact – Delete a contact by clicking the ✖ next to the contact.

Details Section

The details section usually contains the bulk of the information about the application. All the fields in this section are configurable except the organisation structure. The first part of the section contains any required configured predefined fields. Predefined fields are designed for a specific purpose and may be included/excluded depending on the requirements of the template. Examples of predefined fields include; Description e.g. description of goods/services to be purchased, Business Case e.g. reason for purchasing goods/service.

The details section may also contain custom fields configured by the system administrator.

Expenditure Section

Optional section used when the application includes a spending component. Any number of expenditure lines may be added. Each expenditure line has the following fields;

Type – Type of expenditure. The list of valid expenditure types is configured in finance settings.

Currency – Currency of the expenditure. All standard currencies are selectable with AUD the default.

Amount – Amount of expenditure with GST included.

Cost Centre – Cost centre for the expenditure. Available from a lookup list (if cost centres have been configured in finance settings) or free text entry.

GL Code – Available from a lookup list (if GL Codes have been configured in finance settings) or free text entry. This field is only available if configured.

Tax Type – Available from a lookup list. This field is only available if configured.

Supplier Name – Optional supplier name

Supplier Reference – Optional reference. E.g. quote/invoice number

Comment – Optional comment.

Each time an expenditure line is changed, the system determines the delegation(s) required to approve the expenditure and updates the authority section accordingly. The determination is performed by obtaining the delegation required based on the expenditure type and the amount of the expenditure. Note: if the currency type is not AUD, the current day exchange rate is used to calculate the amount in AUD.

Authorities Section

The authorities section contains the authorisation workflow stages required to complete the application. This section is used whenever the application template includes the expenditure section or specific authorities. A user must be selected to perform each stage prior to submission.

Payment Managers Section

Optional section used when allows selection of the users responsible for purchasing and/or payment is required. Payment managers can be a group or an individual user.

All payment managers are notified when an application is completed with an outcome of Approved. Payment managers then use the payments function to process the payment.

Action Items Section

The action items section contains action items that have been created as a result of the application. New action items can also be created from the action items section.

Additional Attachments Section

The additional attachments section allows any number of related documents to be uploaded.

Action Button Section

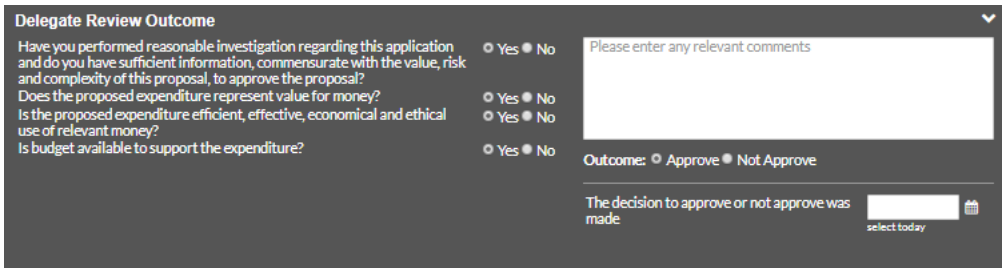
Provides buttons for quick access to commonly used actions. The available actions depend on the permissions of the current user and the status of the application.

Other Sections

Other sections also appear as required.

Authorisation Section

During the authoriser review stage an authorisation pop up is available at the bottom of the screen to allow the authoriser to record their decision. An example appears below.



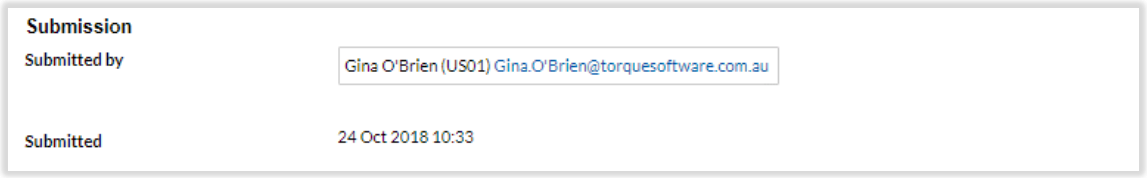
The authoriser must answer any questions, select the outcome and enter the date the decision was made (which may not be the current day). It is important the correct decision date is entered as actions reliant on the outcome (e.g. payments) should not occur prior to the decision date.

Comments must be entered in the following circumstances;

- Outcome is authorised, and the response to any question is not the positive response
- Outcome is not authorised

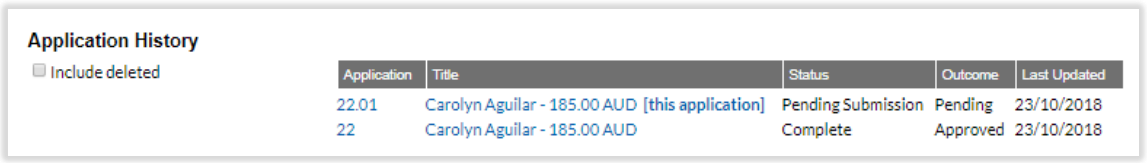
Submission Section

Displays information about the person who submitted the application. This section only appears for submitted applications. E.g.



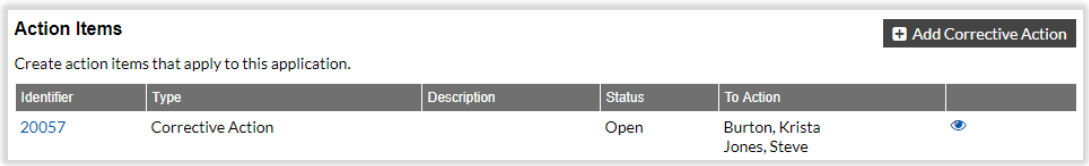
Application History Section

Shows previous application versions when an application has been amended. E.g.



Action Items Section

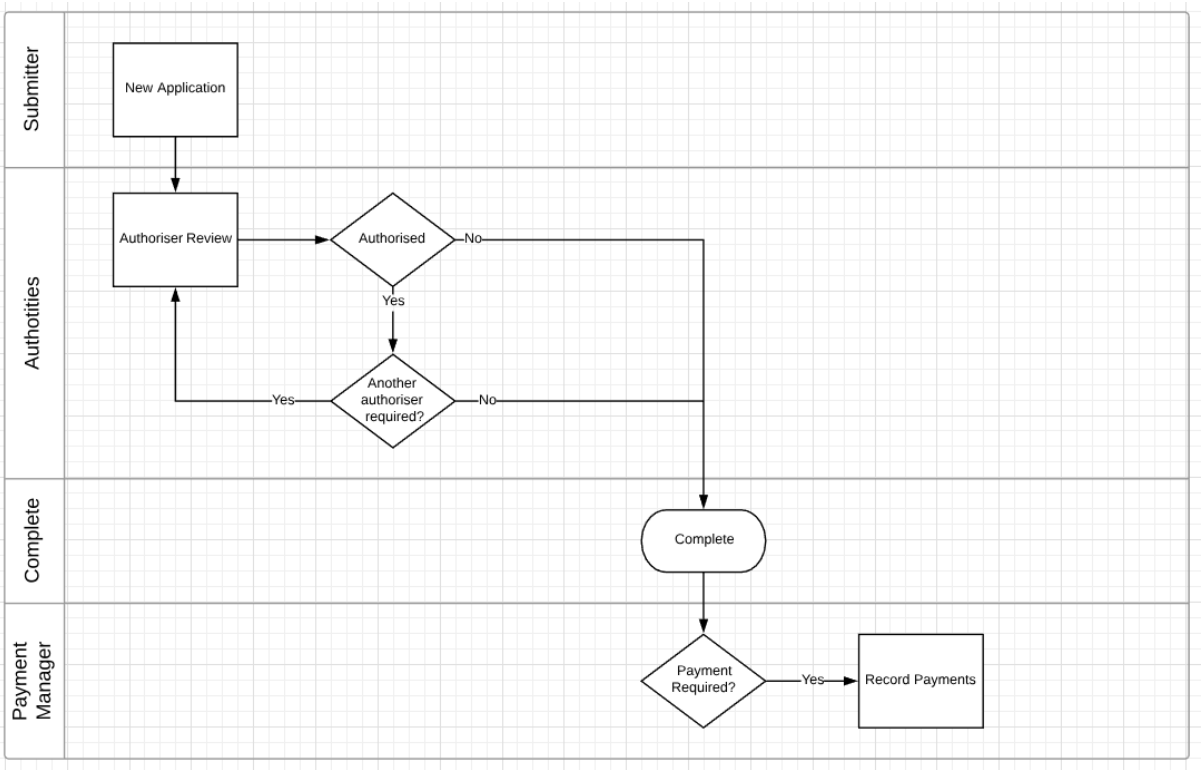
Shows any action items resulting from the application. Also allows items to be added. Section only displays when the application type has been selected in the Applications settings of an Item Type.



Select the identifier to view the record. Select the eye icon to view all the users allocated roles to the item.

APPLICATION WORKFLOW

An application may go through one or more workflow stages, depending on the configuration of the application. The following workflows are available.



The payment manager workflow occurs after the application has been authorised and is complete.

NOTIFICATIONS

Custom applications provide several event-based email notifications. The notification emails are system generated when various events occur for an application. The recipient and type of notification depend on the event and the role the person is performing for the application.

IN-TRAYS

Applications appear in the in-trays of interested parties, depending on the status of the application.

To Action In-Tray

Applications appear in the To Action in-tray of only the allocated person.

In Progress In-Tray

Applications appear in the In Progress in-tray of all interested parties, except the allocated person, when the application is in Pending Submission or Pending Review statuses.

Complete In-Tray

Applications appear in the Complete in-tray of all interested parties when the application is in Completed or Superseded statuses.

Note: deleted applications do not appear in any in-tray and are only retrievable by using Custom Applications reports.

VIEW APPLICATION PERMISSION

The following users have permission to view and report on applications.

- Interested parties of the application.
- Users with reporting permission for the organisation unit recorded for the application.
- Supervisor of any organisation unit at or above the organisation unit recorded for the application.
- Members of the group with Processing Team permission.

UPDATE APPLICATION PERMISSION

Application sections may only be updated by the following users under the following circumstances. Note: authorisers are only able to update where Yes has been selected for "Can edit document" for the authority.

Application Section	Application Status	User
Details, Expenditure, Payments, Additional Attachments	Pending Submission	Allocated user
Details, Expenditure, Payments, Additional Attachments	Pending Review	Allocated user, depending on the setting "Can edit document" in the Authority
Authoriser	Pending Review	Allocated user

REPORTS

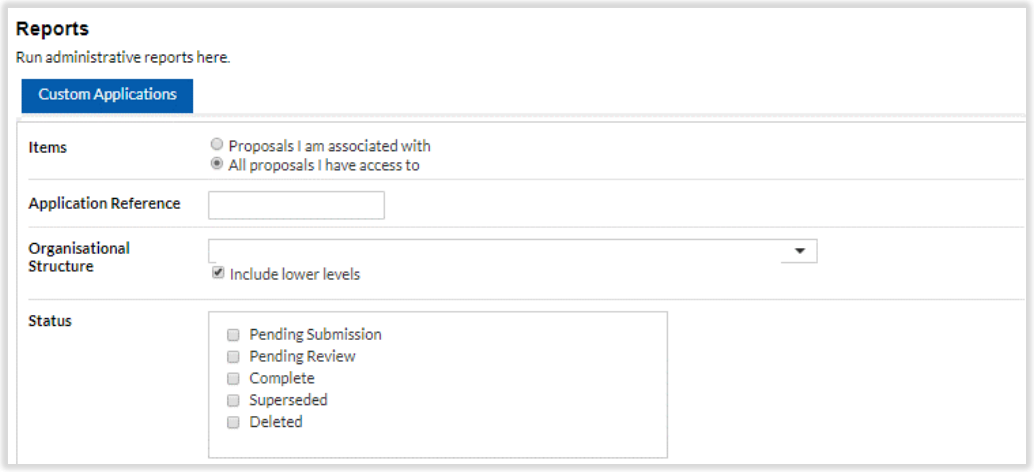
There are two options available for application reporting.

1. Custom application reports provide preset selection criteria and preset report format.
2. Report builder allows reports to be configured.

Custom Application Reports

Any user may access custom application reports. However, the applications returned are restricted by the user's view permissions.

Custom application reports are available by going to **Reports > Custom Applications**.



Various criteria are available to filter applications returned in the report. Select the required criteria and select the Report button at the bottom of the screen.

The following should be noted;

Items – Restricts the records returned based on how the users is related to the application. "Proposals I am associated with" returns applications where they are an interested party. "All proposals I have access to" returns all applications where they have view permission.

Include custom fields – Show or hides custom fields in the report output. By default this value is set to Yes if only a single authorising type is selected to report on. By default this value is set to No if more than one authorising type is selected to report on.

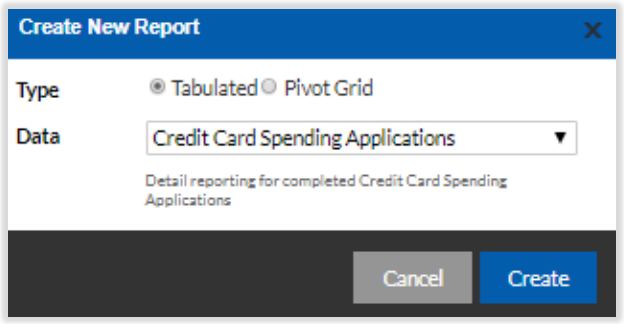
Reports Builder

Configurable reports are available from the Report Builder. When creating a report, select the required application type dataset. The dataset includes all the fields configured for the application type. The dataset also contains the following special fields;

Identifier – Unique identifier for the item.

Status – Status of the application.

Note: it is recommended to avoid configuring custom fields named “Identifier” or “Status” as this will cause duplicate field names in the report builder.



Any user may access application reports. However, the items returned are restricted by the user’s permissions.

See the Report Builder user guide for more information about creating reports.

PAYMENTS

Payments workflow occurs when a spending application is completed with an outcome of approved. The payments workflow is optional and depends on the application configuration. Payments are accessed via the payments in-tray.

Payments In-Tray

Payments processing are available by going to **In-Trays** > **Payments**.

The payments in-tray shows all approved applications waiting for payment to be completed. Applications where payment has been completed may be listed by checking the Include Completed check box. There are three options to filter the applications listed.

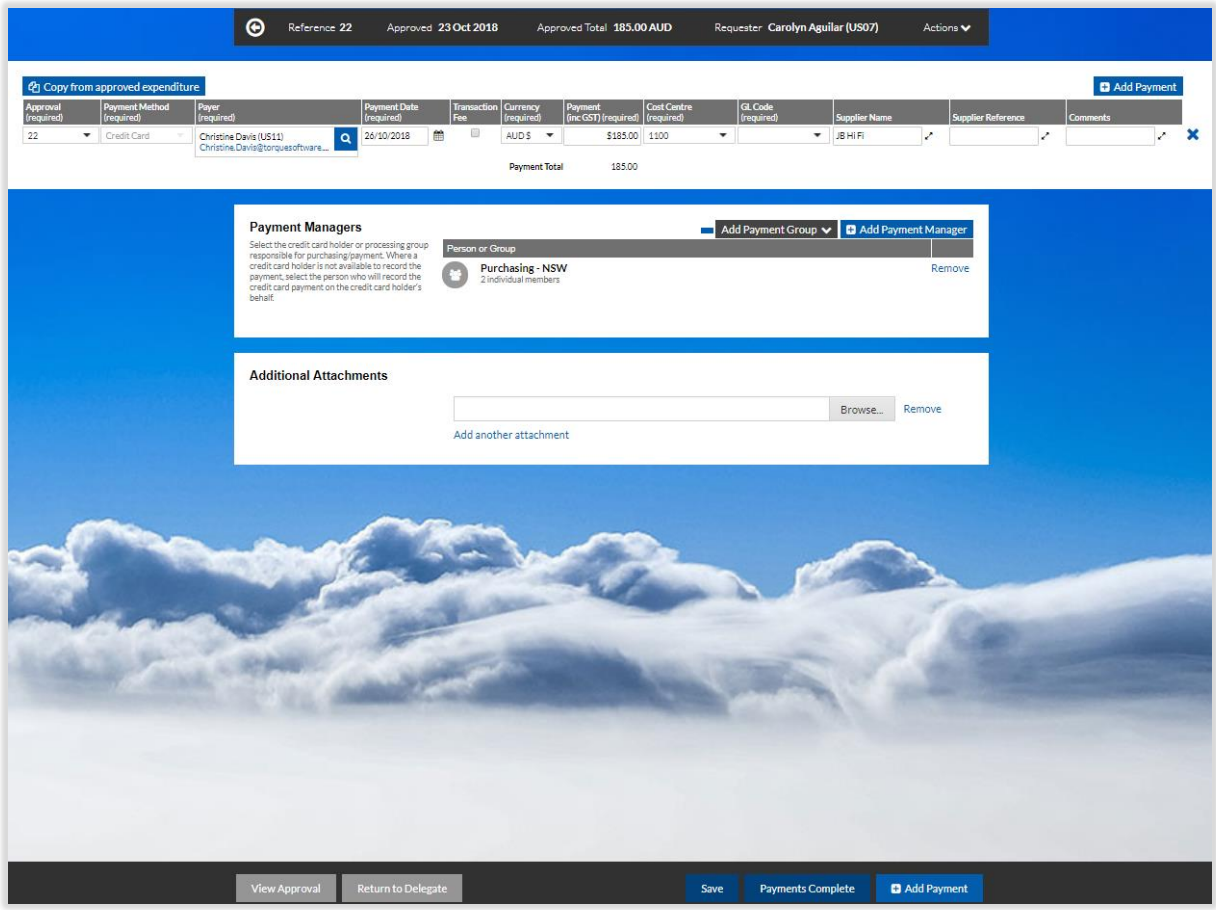
I am a payment manager – Displays applications where the current user is a nominated payment manager for the application. If the payment manager is a group, all members of the group will be able to view the application.

I am an interested party – Displays applications where the current user an interested party of the application. If the interested party is a group, all members of the group will be able to view the application via this option.

I have access – Displays applications where the current user has view permission for the application.

Payment Processing

Select an application from the payment in-tray to record payments. Any user who can access an application may record payments.



Orientation Section

The orientation section displays useful information about the status of the application. Where an application has been amended the information displayed will be for the most recent amendment. The orient strip is not configurable. Information includes the following;

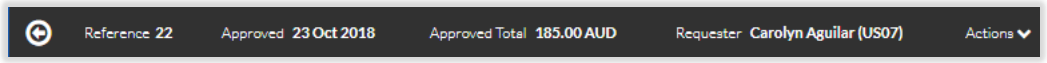
Identifier – Identifier of the application.

Approved – Date when the last required authoriser approved the application.

Approved Total – Total amount in expenditure section.

Requester – Person who submitted the application.

Actions – Drop down list of all available actions. The available actions depend on the permissions of the current user and the status of the application payments. Some actions are also available as buttons at the bottom of the screen.



Actions include the following;

Add to my In-Tray – The application will be included in the current user's payments in-tray. Used when a person is not a payment manager but wishes the application to appear in their payments in-tray.

Hide Payment Managers – Hides the section on the form where payment managers are maintained.

Payments Complete – Changes the status of the Payment to Payment Complete. Used to indicate no more payments are outstanding. Removes the application from all payment manager in-trays and prevents any further payments from being recorded.

Remove from all In-Trays – The application will be removed from the payment in-tray for all users. This will be performed even if the user is a payment manager.

Remove from my In-Tray – The application will be removed from the payment in-tray of the current user. This will be performed even if the user is a payment manager.

Return to Authoriser – Returns the application to a authoriser or the submitter for modification. This has the same function as the return action within an application, including removing the application from all payment manager in-trays.

Save – Saves the current values.

Show Payment Managers – Shows the section on the form where payment managers are maintained.

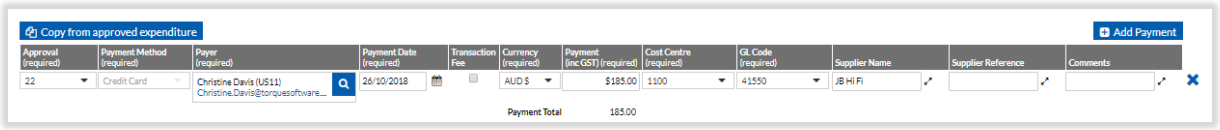
Undo Payments Complete – removes the Payment Complete status. Adds the application back to all payment manager in-trays and allows further payments to be recorded.

View Approval – Displays the most recent approved application related to the payment.

View Log – Shows the log record for the application and payment.

Payment Section

The payment section allows payments made to be recorded.



The following actions are available.

Copy from approved expenditure – Copies the expenditure from the most recent approved application.

Add Payment – Adds a new payment line. Relevant information from any prior recorded payment is copied to the new payment line.

The following fields are available.

Authorising – Identifier of the application the payment is for. May be any identifier in an amendment series.

Payment Method – Payment method used to make the payment. If there is only one payment method allowed, this will be prefilled and not editable.

Payer – Person who made the payment. Defaults to the current user.

Payment Date – Date the payment was made. Must be on or before the application expiry date if this has been configured.

Transaction Fee – Indicates the payment is for a transaction fee. Transaction fees do not require authorising.

Currency – Currency used to make the payment.

Payment – Amount of payment including GST.

Cost Centre – Cost centre lookup list. May also allow free text entry if the finance setting, "Restrict to list" for cost centres is turned off. Must meet any input mask configured for cost centres in finance settings.

GL Code – General ledger code lookup list. May also allow free text entry if the finance setting, "Restrict to list" for GL code is turned off. Must meet any input mask configured for GL codes in finance settings.

Tax Type – Tax Type lookup list. This field is only available if configured.

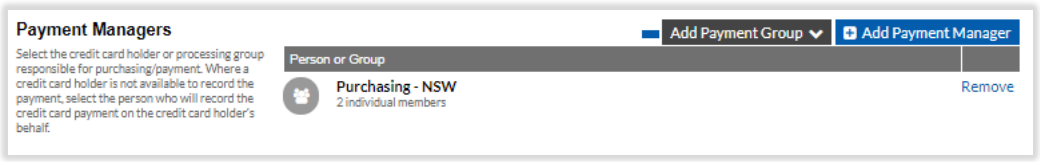
Supplier Name – Free text supplier name, optional.

Supplier Reference – Free text supplier reference (e.g. invoice number), optional.

Comments – Free text comments, optional.

Payment Manager Section

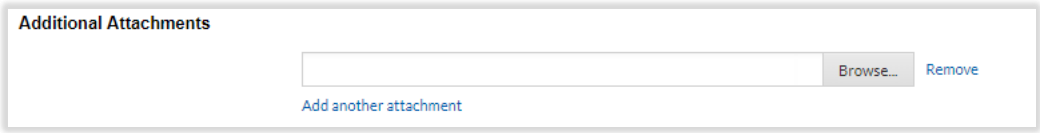
The payment manager section allows payment managers to be changed.



This has the same function as the payment manager section in the application and will also update the payment managers in the application.

Additional Attachments Section

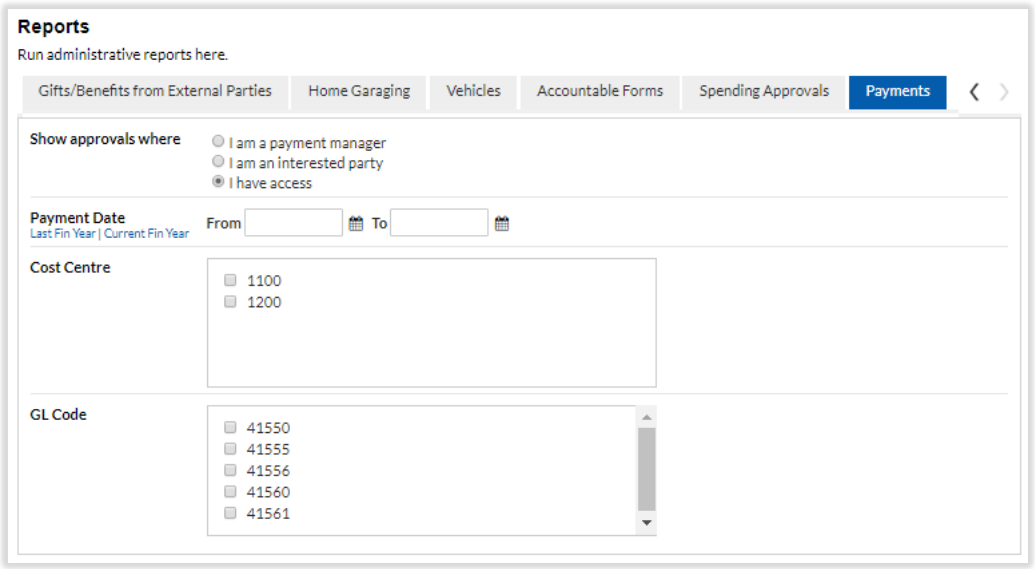
The additional attachments section allows attachments specific to the payment to be included.



PAYMENT REPORTS

Any user may access payment reports. However, the payments returned are restricted by the user's view permissions for the related application.

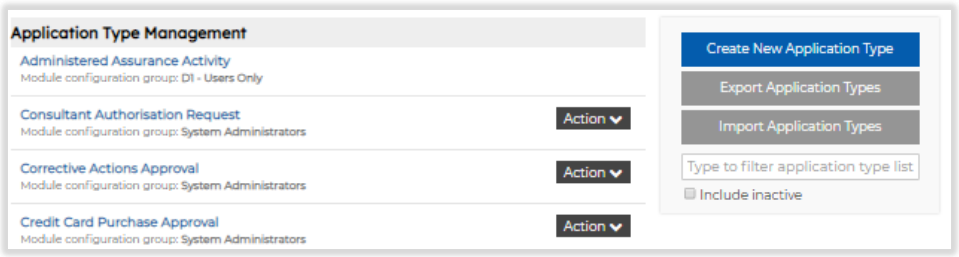
Payment reports are available by going to **Reports > Payments**.



APPLICATION CONFIGURATION

Application Type Management

Custom application configuration is available by going to **System Administration** > **Applications and Records** > **Application Types**.



New custom applications can be created, and existing custom applications can be modified. Only members of the module configuration group may configure the application type.

Other Settings

There may also be other settings to be configured, depending on how a custom application is configured. These include the following;

Authorities require configuration if the application includes the expenditure section or if any other review workflow is required.

Expenditure Types in Finance settings require configuration if the application includes the expenditure section.

Payment Methods in Finance settings require configuration if the application includes the payment section.

Cost Centre in Finance settings require configuration if the application includes the expenditure section.

GL Code in Finance settings require configuration if the application includes the payment section.

Payment types in System settings require configuration if the application includes the payment section and groups are selectable as payment managers.

Groups require configuration if the application includes authorities or the payment section and groups are selectable as payment managers.

Creating New Custom Application Types

There are three ways to create a new application type.

- Select Create New Application Type from the Application Type Management Screen.
- Create a copy of an existing application type by selecting **Action > Copy** next to the application type to copy.
- Import an application type by selecting Import Application Types from the Application Type Management Screen.

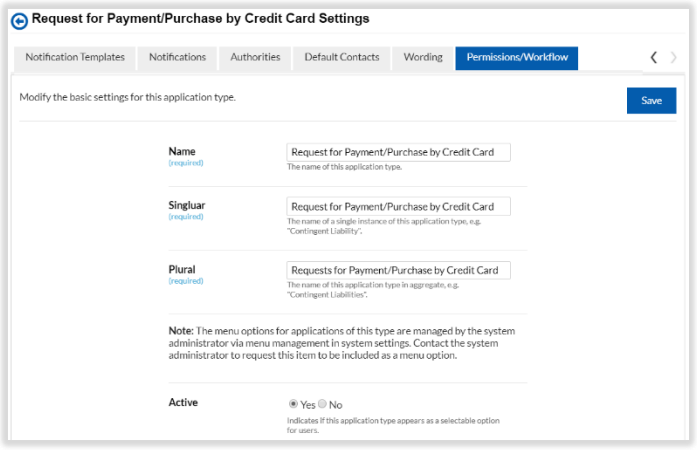
New application types may only be created by users with the appropriate permission. This permission is granted by the system administrator by going to System Settings > Permissions / Workflow and setting the **Custom Application Creators** group.

Configuring New Custom Application Templates

When a new custom application template is created, Permissions/Workflow configuration must be completed and saved before other configuration options are available. New custom application templates default to being inactive to prevent them from accidently being made available to users prior to configuration being completed.

Custom Application Configuration Tabs

Custom applications configurable settings are grouped into several tabs.



Permissions/Workflow Tab

The following configuration settings are available in the permissions/workflow tab.

Name – Name of the custom application.

Singular – Name used when referring to only a single application.

Plural – Name used when referring to multiple applications.

Active – Active custom applications are available for use and appear in the menu system. Inactive custom applications are not available for use and are hidden from the menu group.

Processing team – The group who are responsible for overviewing the use of the custom application. Members of the group have permission to view and report on all applications. Processing team members may also assign reporting permissions for the application type.

Module configuration – The group with permission to configure the custom application. Module configuration group members may also assign reporting permissions for the application type. Note: System administrators may always configure any custom application, irrespective of this setting.

Unlock after reopen – Identifies the users who can unlock and update a completed application. Completed applications cannot normally be updated to ensure the information on the application is not changed after review by the authoriser. Users with this permission will have access to an Unlock action in the actions menu on the orientation section.

Supervisors can report against own branches – Allows organisation unit supervisors to be able to report all applications where they are the supervisor of the organisation unit (and all lower levels) in the application.

Restrict Visibility – Set to yes to restrict access to a custom application type to a specified user group.

Form Tab

The form configuration settings allow various predefined fields to be shown or hidden on the application. The fields appear in the application in the same order as they appear in the configuration settings.

Show additional contacts – Shows/hides the additional contacts section.

Show subject person – Shows/hides the subject person lookup field. The subject person field is used when the application is about a specific person. E.g. the traveller in a travel request application. The subject person field appears by default in all reporting. If Yes is selected, the following settings are available;

> **Subject person label** – the label used on the application for the subject person. Note: the label "Subject Person" is used in reports irrespective of this setting.
>
> **Subject must submit** – forces the person selected as the subject person to submit the application. Useful when the subject person is making a declaration for example.

Show organisation unit – Shows/hides the organisation unit.

Show short title – Shows/hides a short text field for entering a short title. If Yes is selected, the following setting is available;

Short title label – the label used on the application for the short title. Note: the label "Short Title" is used in reports irrespective of this setting.

Show description – Shows/hides a long text field for entering a description. Usually used when a description of the good/services or action being taken is required. If Yes is selected, the following setting is available;

Description label – the label used on the application for the description field. Note: the label "Description" is used in reports irrespective of this setting.

Show business case – Shows/hides a long text field for entering a business case. Usually used when a reason for purchasing goods/services or taking an action is required. If Yes is selected, the following setting is available;

Business case label – the label used on the application for the business case field. Note: the label "Description" is used in reports irrespective of this setting.

Show defined term – Shows/hides the question "Is the proposed arrangement for a defined term?". If the user answers Yes, the user must enter the start date and end date of the defined term. If Yes is selected, the following setting is available;

Defined term required – If yes, the defined term question is automatically set to the Yes and is hidden. This means only the date range will be shown.

Show expiry date – Shows/hides an expiry date. Defaults to the end date of the defined term. Note: if an expiry date is entered in the application, the payment date for any payments recorded for the application must be on or before the expiry date.

Show existing approved applications – Shows/hides the question "Is this application under an existing application?" an expiry date. If Yes is selected, the user must select the parent application from the set of approved applications.

Show expenditure – Shows/hides the expenditure section. If Yes is selected, the following settings are available;

Expenditure types – Allows selection of the expenditure types available for selection in the expenditure section.

Default expenditure type – The expenditure type to show by default on the first expenditure line.

Show GL code in expenditure – Makes a GL Code field available in the expenditure section.

GL code mandatory – Makes the GL Code field mandatory (if available).

Show tax type in expenditure – Makes a tax type field available in the expenditure section.

Tax type mandatory – Makes the Tax type field mandatory (if available).

Show risk assessment – Shows/hides the question "Risk assessment undertaken?" If a risk assessment has been undertaken, then the user is given the option to enter the risk assessment details or upload a document. If Yes is selected, the following setting is available;

Risk threshold – The spending amount where a risk assessment is required. Defaults to $80,000. If the total expenditure is above this amount the user will be required to enter a risk assessment.

Is a contingent liability – Reserved for future use. Ensure this is set to No.

Authority section title – Text to appear as the heading of the authority section.

Self authorisation allowed – If set to No, the subject person will not be able to be selected as an authoriser. Useful when the purpose of the application is for the benefit of the subject person and a conflict of interest would arise. E.g. Travel request.

Default decision date to today – if set to Yes, the outcome decision date will be defaulted to the current date.

Include purchase orders – Reserved for future use. Ensure this is set to No.

Include payment – Shows/hides the payment section and enables payment processing. If Yes is selected, the following settings are available;

Payment methods – Used to select the allowed payment methods when recording a payment.

Payment group type – Used to select the allowed group types when selecting a group as the payment manager. Only groups of the selected type will be able to be selected as a payment manager.

Default payment management group – The selected group will be automatically set as the payment manager.

Hide payment manager section – Hides the payment manager section. This prevents the user from changing the default payment manager group.

GL Code mandatory in payments – If set to yes, forces entry of GL code when recording a payment.

Show tax type in payments – If set to yes, includes a tax type lookup field when recording a payment.

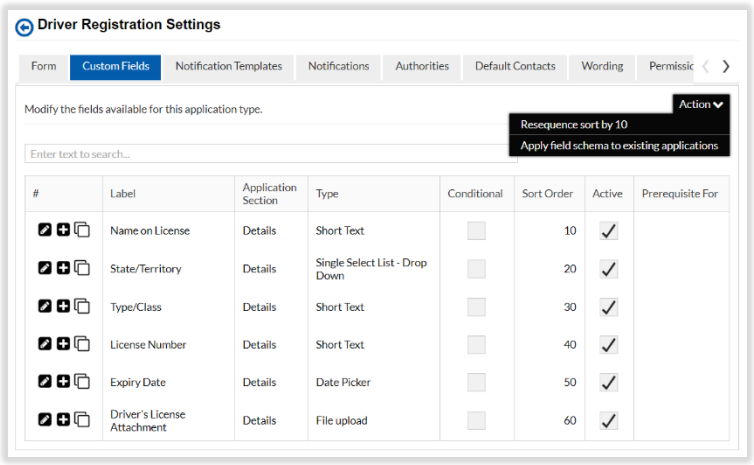
Allow future payment dates – If set to yes, allows the payment date to be in the future. An option to provide a warning is also available.

Allow amendments – If set to yes, the amendment action will be available for completed applications.

Show additional attachments – Shows/hides the additional attachments section at the bottom of the form.

Custom Fields Tab

Custom fields allow the collection of almost any type of information within an application. There is no limit to the number of custom fields in an application. Custom fields are in addition to any predefined fields selected in the form tab.



Add a custom field by selecting any ⊕ button. Note: an application will only include the custom fields active at the time the application is created.

Edit a custom field by selecting the ✎ button next to the field.

Delete a custom field by selecting the ⊖ button next to the field. Note: this button is not available if the field has already been populated with data in an application or the field is used as the condition for another field.

Copy a custom field by selecting the ⧉ button next to the field. The copy will be opened in edit mode.

Actions

Selecting the Action button provides the following options.

Resequence Sort Order will reset the sort order for all fields in increments of 10.

Apply field schema to existing applications will update existing incomplete applications with any changes made to custom fields. An option allows existing complete records to also be updated.

Custom Field Settings

Custom fields have the following settings.

Label – Name the of the custom field. The label is also used in custom application reporting.

Caption – Caption used on the application. If there is no caption, the label is used.

Application Section – Section within the application where the field will appear. Custom fields always appear at the bottom of the selected section.

Answer Type – The type of information allowed when the field is populated. Most answer types allow a default value to be defined. The following answer types are available;

Classification – Allows a classification to be selected.

Date Picker – Allows the field to be populated with a date.

Hours & Minutes – Allows the field to be populated with any number of hours and up to 59 minutes. May also be negative.

Long Text – Allows a large amount of free text.

Lookup List – Allows selection from a defined Lookup List (see Lookup List Maintenance section). Lookup lists may also be hierarchal. Displays the options as a drop-down list. Provides the following options

Selection Level – The level within a hierarchy that can be selected. Not relevant for single level lookup lists.

Selection Style – Allows only a single value to be selected or multiple values.

Allow inactive selection – If turned on, inactive lookup values may be selected.

Multi-Select List – Allows a multiple selection from a defined list of values. The defined list of values is configured in the Values setting. Enter each value as a separate line.

Note – Does not allow any value to be entered. This answer type is used to display headings and other text on the application. The note answer type allows any html to be displayed.

Numeric – Allows population with any numeric value. Also allows a minimum value and/or maximum value to be defined. An error will be reported if the populated value is outside these values.

Organisation Structure Selection – Allows selection of an organisation unit from the system organisation structure.

Short Text – Allows only a small amount of free text.

Single Select List - Radio – Allows a single selection from a defined list of values. The defined list of values is configured in the Values setting. Enter each value as a separate line. Displays the options as radio buttons.

Single Select List – Drop Down – Allows a single selection from a defined list of values. The defined list of values is configured in the Values setting. Enter each value as a separate line. Displays the options as a drop-down list.

Time Picker – Allows the field to be populated with a time.

User Selection – Allows selection of a user from the system users. Optionally, the users available for selection may be restricted to the members of a selected group.

Yes/No – Allows only the responses Yes or No.

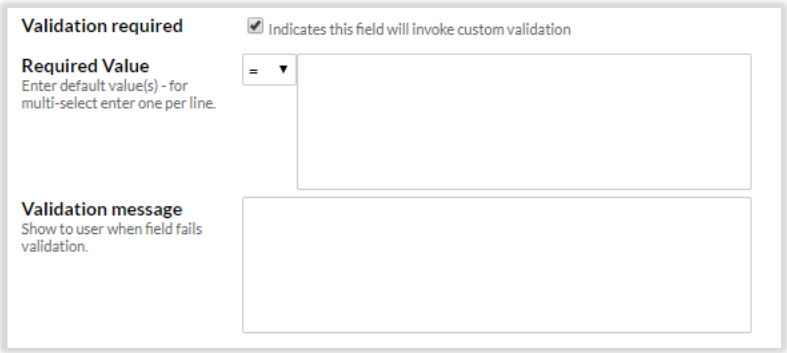
File Upload – Allows a file to be uploaded. Can be configured to allow only file upload via browse or pasting an image from the clipboard or both.

Risk Level – Allows a risk level to be selected. Presents a risk matrix to the user for selection of a risk level.

Application Link – Allows linking to a non-compliance record or another custom application be entering the identifier record to be linked.

Input Mask – The custom field response will be forced to match the input mask. Any Standard Numeric Format String is acceptable. E.g. "C" will force value to be in the form of currency. This option is only available for certain answer types.

Validation Required – Forces the populated value of a field to meet the required validation. This option is only available for certain answer types. Where available, the following configuration is applicable.

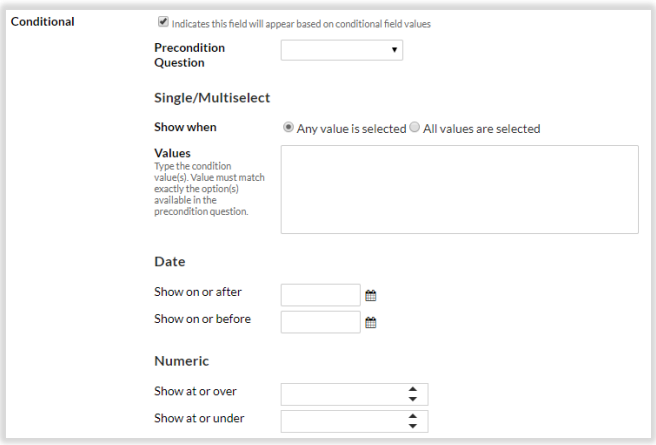


Required Value – Consists of a conditional operator (e.g. =, <, >) and the required values. The condition operates as if the populated value of the field is to the left of the conditional operator.

The condition is tested against all required values. If any condition evaluates to false, then the text in the validation message is presented to the user and the application will not be able to move to the next stage in the workflow.

For the Date Picker answer type, the special value "[TODAY]" is used to represent the current date.

Conditional – Visibility of the field is conditional on the value of another field.



Select the field the condition will be based on in the Precondition Question.

Enter the value of the precondition question required to make the field visible in the value area.

For Date Picker answer types, enter the applicable dates. One or both dates may be entered.

For Numeric answer types, enter the applicable number range. Upper and/or lower number ranges may be entered.

For all other answer types, enter the required values in Values. Enter each value on a separate line. The value must match exactly the value option of the precondition question.

The **Any value is selected** option will make the field visible if any of the possible values is selected on the application.

The **All values are selected** option will make the field visible only if all the possible values are selected on the application. This option is only applicable to Multi-Select List answer types.

Mandatory – Forces the field to be populated.

Include in Reports – If unchecked, the field will be return null in the reports configured using the Report Builder and will not be included in the predefined custom applications reports.

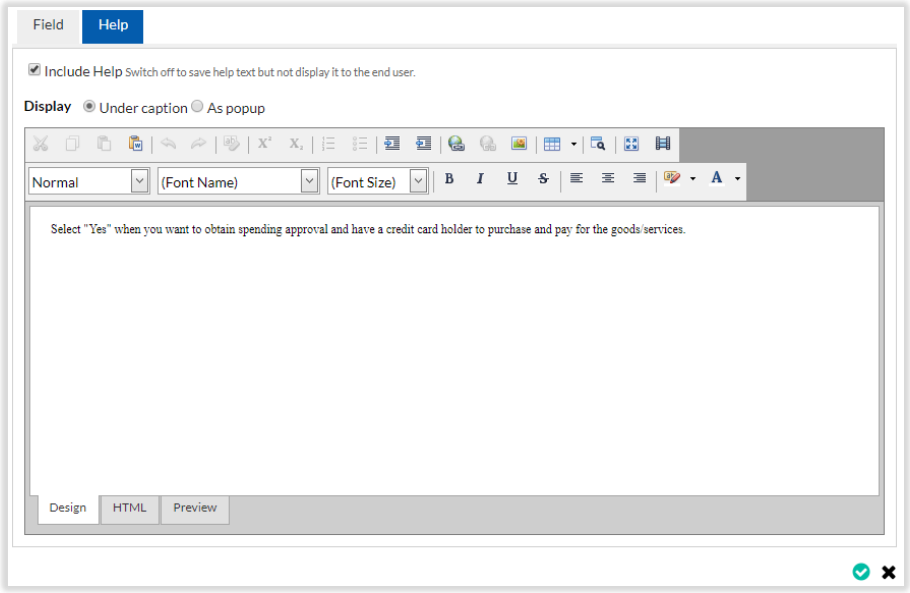
Include in Email – If checked the field will be included in all notification emails.

Active – When an application is created, only fields active at the time of creation will be included in the application. If the field is made inactive, the field will remain in any applications created prior to the field being made inactive.

Help Tab

Allows context sensitive help to be configured for the field.

Any html value may be entered. This includes images, intranet/internet links and documents.



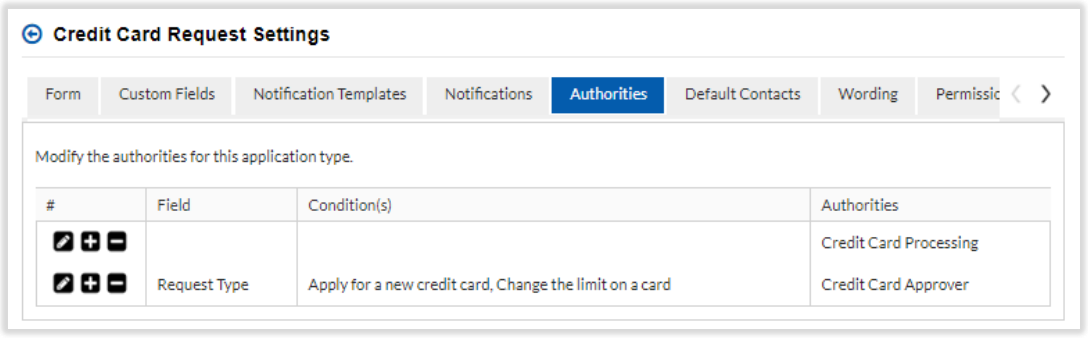
Display configures how the help will be presented.

> **Under caption** – Displays the help under the caption of the field.
>
> **As Popup** – Displays help icon at the end of the caption. The help text will be displayed when the icon is selected.

Authorities Tab

Defines workflow by selecting the authorities who must review the application.

See the Maintaining Authorities section in **FMCS Guide – System Administration and Global Settings** to configure Authorities.

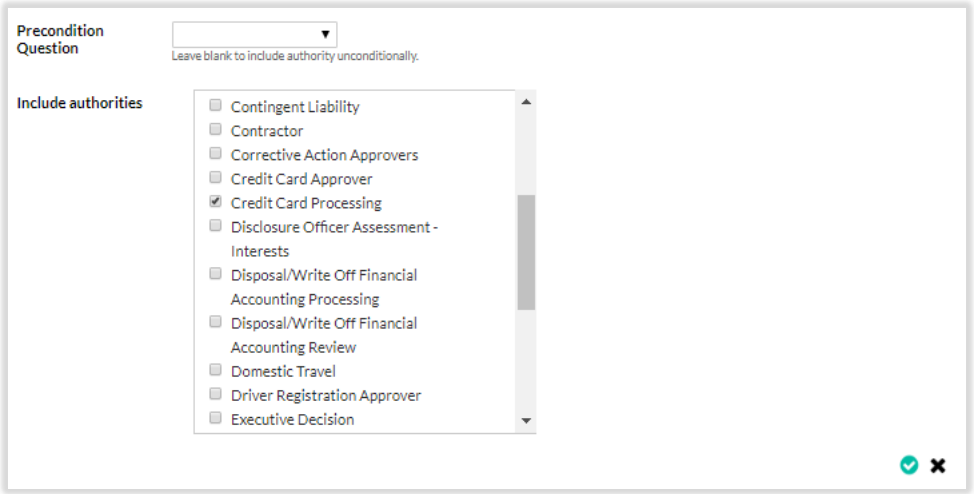


The application will be workflowed for review to each authority selected. The workflow will be in the order of the Workflow step defined in the selected authorities.

Workflow to authorities can be unconditional or conditional upon the value of a custom field.

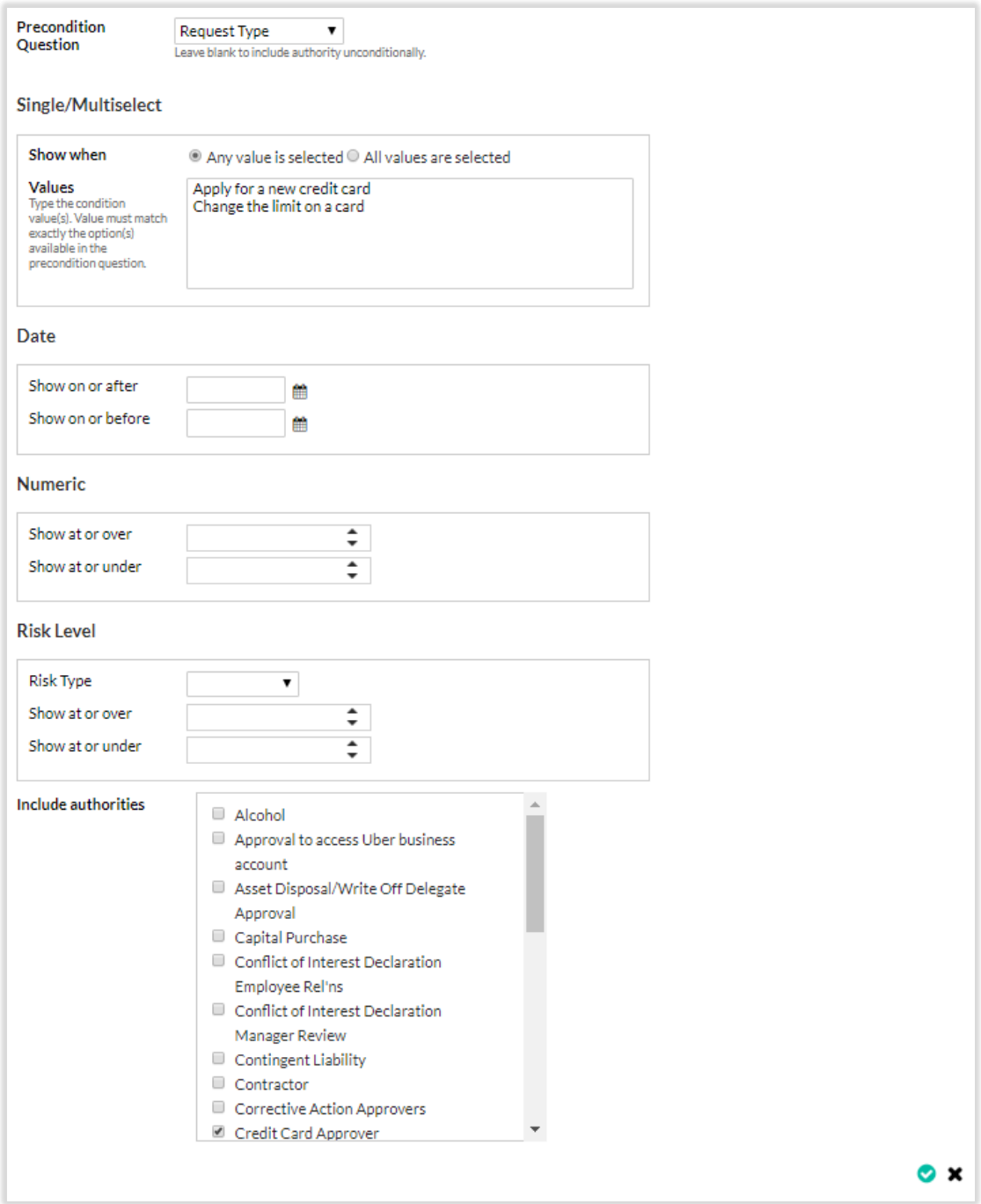
Unconditional Authority Workflow

Authority workflow is unconditional if a Precondition Question is not selected.



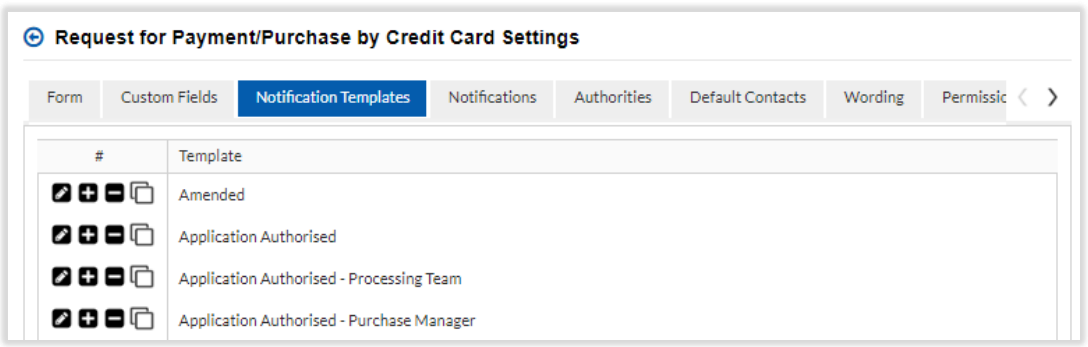
Conditional Authority Workflow

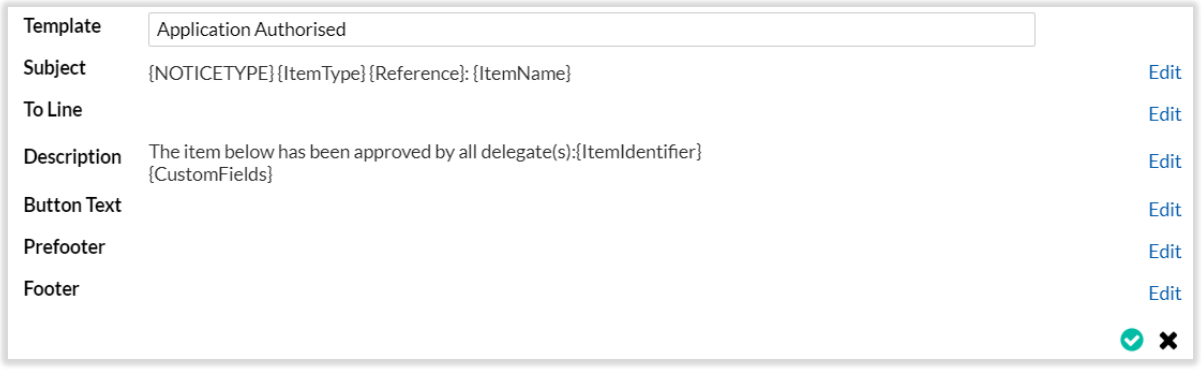
Authority workflow is conditional if a Precondition Question is selected. The workflow will only apply if the value of the custom field selected in the Precondition Question meets the Single/Multiselect, Date, Numeric or Risk Level value. The type of value used is determined by the answer type of the selected custom field.



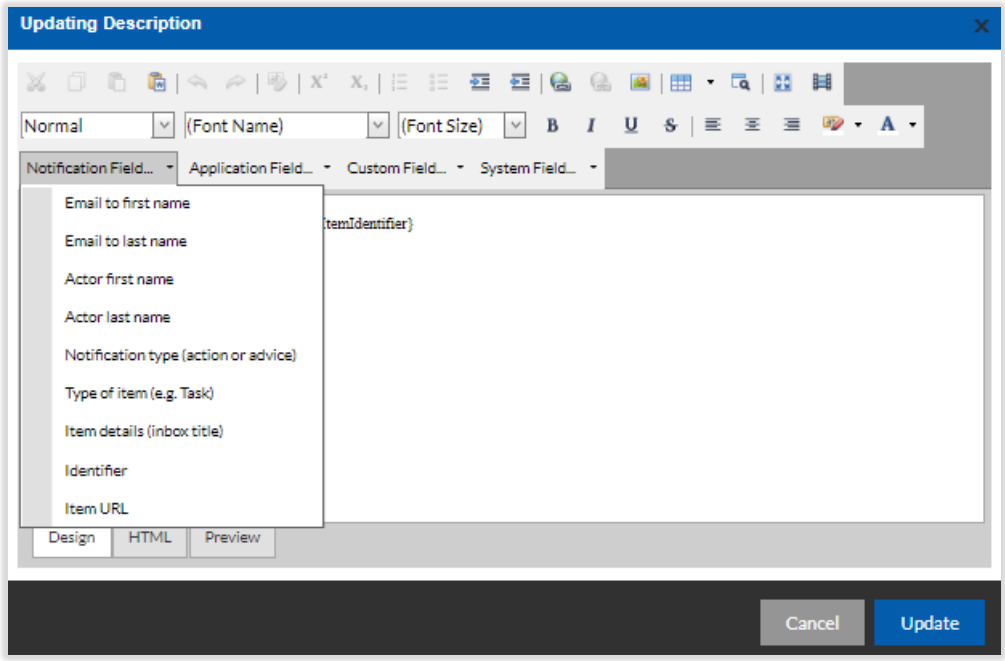
Notification Templates Tab

Allows the templates used for notification emails to be configured.





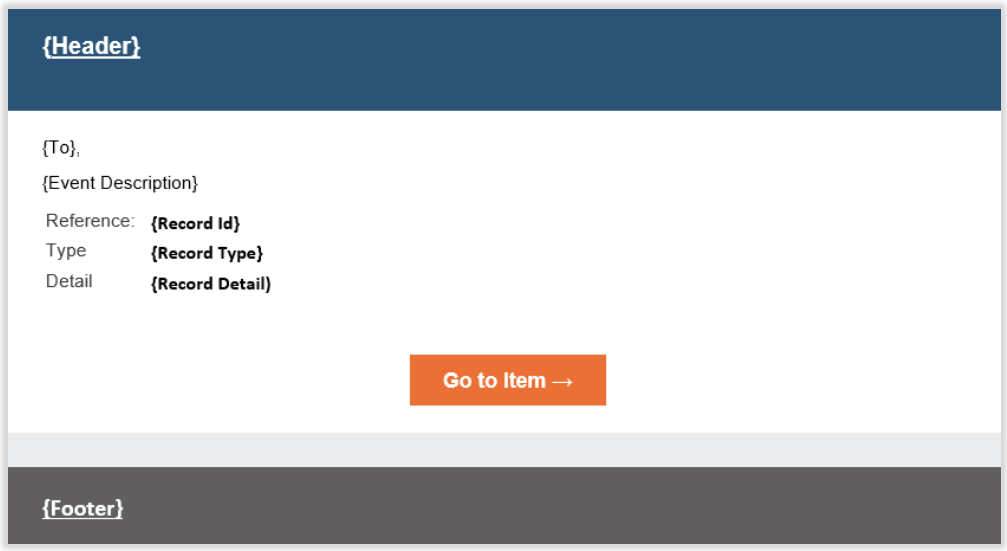
The text to display in a section can be modified by selecting the Edit button. Merge fields can be added by selecting from Notification Fields, Item Fields or System Fields lists.



Note: The NOTICETYPE merge field is populated with "[ACTION]" if the recipient is the current allocated person and "[ADVICE] if the recipient is not the current allocated person.

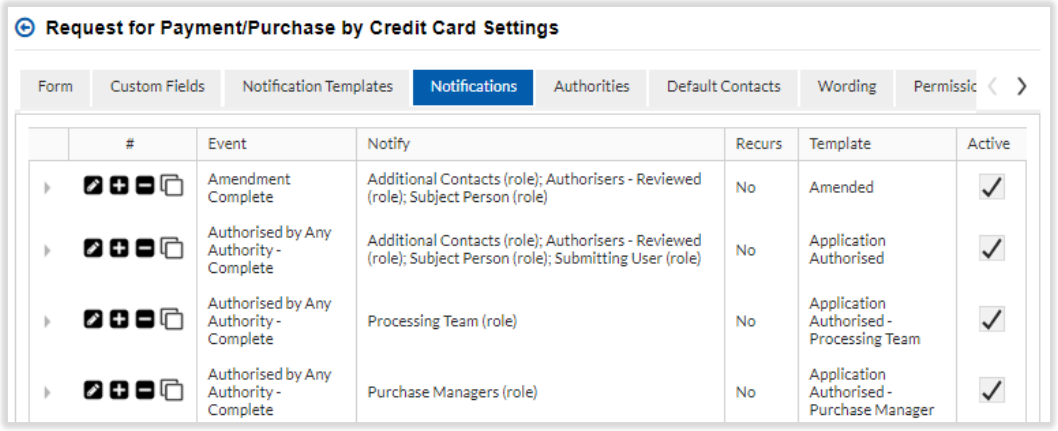
Template Format

A sample template appears below



Notifications

Configures the schedule for sending notification emails.



The roles receiving the notification are configured by selecting the grey arrow to the left of the notification. Note: Emails are not sent to the person who performed the action causing the notification event.

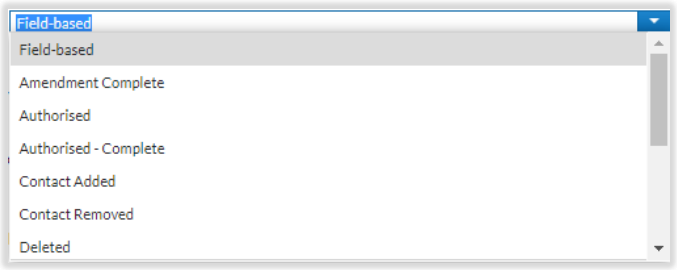
Warning: Do not select a role for notifications where the role has been granted to large numbers of users as this may result in numerous emails being sent.

The following settings are available for notifications.

Event Details

The settings available depend on the type of event selected. All possible options are described below.

Event – Identifies the event causing the initial notification to be sent. See APPENDIX A – EVENTS for a list of events and default settings.



Authority – sets an event to be triggered only when the application is submitted to the selected authority. If no authority is selected, the event will be triggered when submitted to any authority.

Event date field – the date field a field based event is based on. E.g. Start Date, Due Date etc. This only applies if the Event is Field-based.

Start offset interval – Defines the period (Days or Months) used for the Start Offset.

Start offset – The notification will initially be sent this number of start offset intervals from the event date field value. E.g. if the notification should be sent 2 days prior to the date then the offset would -2 and the interval would be days.

Use merge field for start offset – Allows selection of a field to be used as the start offset instead of a fixed value.

Template

Notification Template – Template to be used when sending the notification.

Recurrence

Recurrent notification – Indicates the notification is to recur after the initial notification.

Recurrence interval, Recur Every – Identifies when the next recurrent notification will be sent after the previous notification.

End recurrence section – Identifies when the recurrence will end. Recurrences may end on finalisation and/or after number of recurrences and/or after the date in a date field is reached

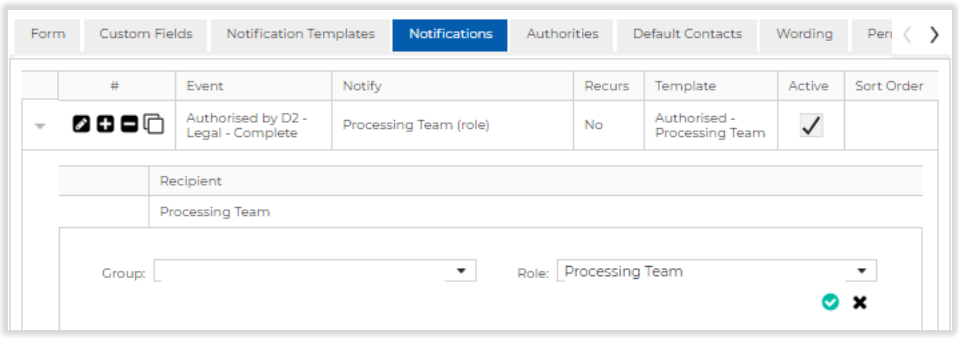
Status

Active – Inactive notifications are not sent.

Sort Order – Notifications are listed based on Sort Order. Enables easier management of notifications.

Recipients

Select the small grey arrow next to the notification to configure the recipients of the notification. Any number of recipients may be configured.



Group – The notification will be sent to all members of the group.

Role – The notification will be sent to all users assigned the selected role. Also allows the selection of a custom field with User Selection as the Answer Type. If a custom field is selected, the notification will be sent to the user populated in the custom field.

Default Contacts Tab

User or group entered here will be automatically included as an additional contact when an application is created.

Wording Tab

Allows several text values used on the form to be configured. All wording allows any html value. All wording is optional.

Application Preamble – The text appearing in the preamble section.

Description Help – Help for the predefined Description field. Help text appears under the description field caption.

Business Case Help – Help for the predefined Business Case field. Help text appears under the description field caption.

Expenditure Help – Help for the expenditure section. Shows a help icon

. Help text appears when the help icon is selected.

Submitter Declaration – declaration the submitter must agree to when submitting the application. The declaration and the date and time agreed appear in the submission section.

Authoriser Declaration – declaration the authoriser must agree to when authorising the application. The declaration and the date and time agreed appear in the details of the authority section.

Submit Instructions – Instructions shown when the instructions link in the orientation section is selected when the application is at pending submission status.

Authoriser Instructions – Instructions shown when the instructions link in the orientation section is selected when the application is at pending review status.

Complete Instructions – Instructions shown when the instructions link in the orientation section is selected when the application is at complete status.

Deleted Instructions – Instructions shown when the instructions link in the orientation section is selected when the application is at deleted status.

Superseded Instructions – Instructions shown when the instructions link in the orientation section is selected when the application is at superseded status.

Transaction Fee Help – Help for the transaction fee field in Payments. Shows a help icon next to the transaction fee field. Help text appears when the help icon is selected.

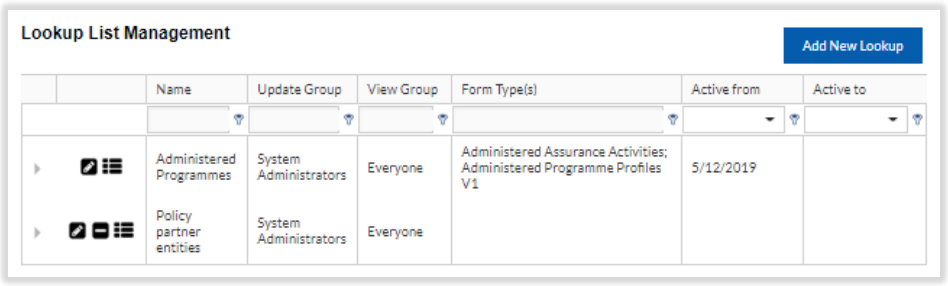
Payment Manager Selection – Help displayed in the Payment Manager Selection section.

Payment Manager Preamble – Preamble for the Payments screen.

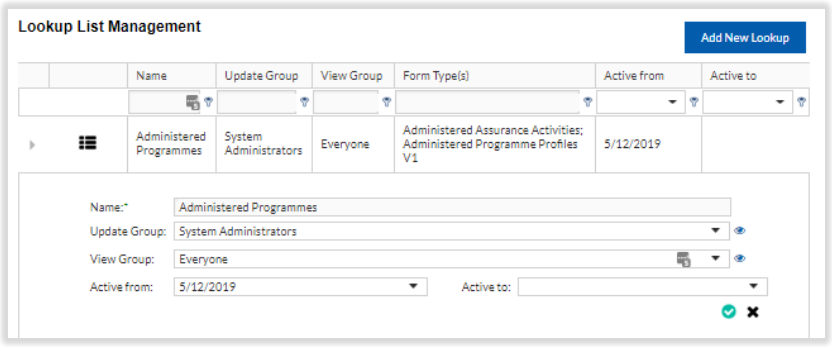
Lookup List Maintenance

Lookup lists may be created and then used as answer types in custom fields in any number of application types. Lookup lists may be single level or hierarchical.

Access Lookup List maintenance via the menu system or by selecting Alt M and selecting "Administration – Lookup List".



Lookup Configuration



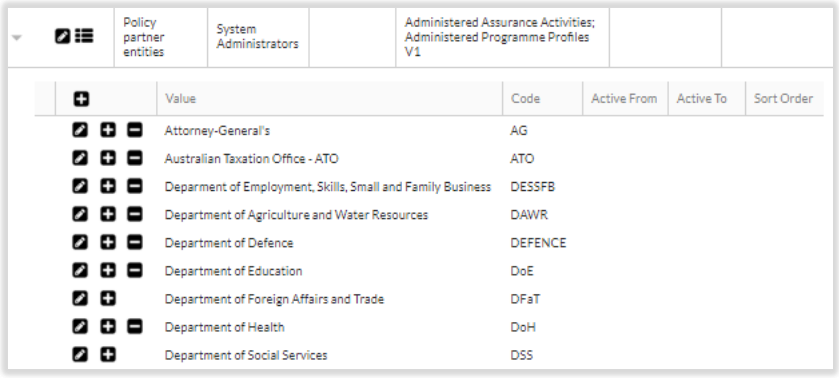
Name – Name of the lookup.

Update Group – The group of people who can update the lookup.

View Group – The group of people who can view the lookup within Lookup Maintenance. Note: Users who are populating a custom application are always able to view the lookup within the application.

Active From, Active To – Period the lookup is active. Optional.

Lookup Values



Create the values for the lookup by selecting the grey arrow to the left. Select the ⊕ button in the header to add a new top level value. Select the ⊕ next to a value to create a new lower level value.

APPLICATION MENU ITEMS

Menu items to access the application in-tray and create new applications are configured by the system administrator. Select "System" as the Type when creating menu items for custom applications. The following System Functions are available;

Intray Menu Item – "In-Tray – " & Name where Name is the name in the permissions/workflow tab. E.g. "In-Tray - Request for Payment/Purchase by Credit Card".

New Menu Item – "New – " & Name where Name is the name in the permissions/workflow tab. E.g. "New - Request for Payment/Purchase by Credit Card".

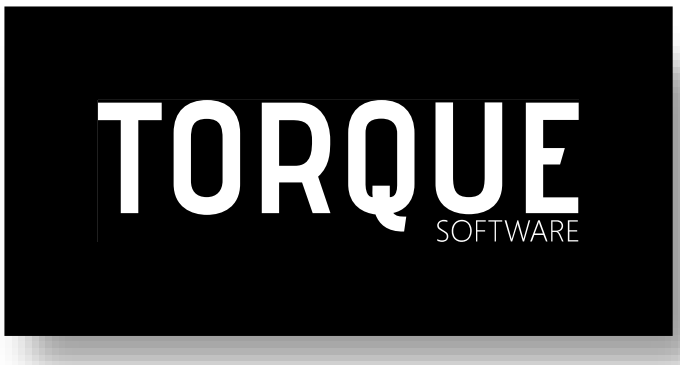
A tile for the application is automatically made available on the home screen when the application template is made active.

APPENDIX A – NOTIFICATION EVENTS

The following table describes the available notification events. When a new application type is created, several default notifications are also made available. Where a default notification is available, the default recipient roles have been included.

Event	Triggered	Default Recipient Roles
Field-based	When either of the following is the current date; • Custom field with answer type of Date Picker • Last Saved Date when in Pending Submission status (useful for sending submission reminders).	
Authorised	When an authority has submitted with a selected outcome of Authorised. Note: this event may be restricted to a specific authority.	Additional Contacts Authorisers – Reviewed Subject Person Processing Team
Authorised - Complete	When an authority has submitted with a selected outcome of Authorised and the application has moved to complete status. Note: this event may be restricted to a specific authority.	Additional Contacts Authorisers – Reviewed Subject Person Processing Team
Amendment Complete	An amendment has moved to complete status.	Additional Contacts Authorisers – Reviewed Subject Person
Contact Added	Additional contact added and saved.	Affected User/Group
Contact Removed	Additional contact removed and saved.	Affected User/Group
Deleted	Application delete action completed.	Additional Contacts Authorisers – Reviewed Subject Person
Not Authorised - Complete	When an authority has submitted with a selected outcome of Not Authorised and the application has moved to complete status. Note: this event may be restricted to a specific authority.	Additional Contacts Authorisers – Reviewed Subject Person

Payments Complete	Payments Complete action completed.	Additional Contacts Authorisers – Reviewed Subject Person Submitting User
Payments Complete Undone	Undo Payments Complete action completed.	Additional Contacts Authorisers – Reviewed Subject Person Submitting User
Reallocated	Reallocate action completed	Affected User/Group Authorisers – Reviewed
Returned	Return action completed	Affected User/Group Prior User/Group
Submitted	Application has been submitted to an authority	Affected User/Group Additional Contacts Subject Person
Undeleted	Application undelete action completed.	Additional Contacts Authorisers – Reviewed Subject Person



Phone: 1300 795 581
www.torquesoftware.com.au.

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