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LIGHTHOUSE USER GUIDE
Introduction to Lighthouse

Version 5.5 to 5.8.5

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THE PURPOSE OF THIS DOCUMENT

Welcome to Lighthouse, from Torque Software.

This document is a training manual to assist you in achieving maximum efficiency when you use Lighthouse.

This document provides an Introduction to Lighthouse for all levels of users available within Lighthouse.

Lighthouse is designed to assist Commonwealth entities meet their obligations under the PGPA Act to;

- establish and maintain an appropriate system of risk oversight and management, including implementing measures directed at ensuring officials of the entity comply with the finance law.
- develop and implement appropriate processes to review the entity's compliance with the finance law and ensure instances of significant non-compliance are notified to the responsible Minister in accordance with paragraph 19(1)(e) of the PGPA Act.

Lighthouse is also an important component in meeting the requirements of Resource Management Guide 214 to report significant non-compliance to the Finance Minister and the responsible Minister, and also to include significant non-compliance in the Commonwealth entity's annual report. The Compliance Breach Reporting and Compliance Survey Module is based on the recommendations in Resource Management Guide 214 which identify non-compliances as being significant in the following circumstances;

- failure to comply with the duties of accountable authorities (sections 15 to 19 of the PGPA Act);
- serious breaches of the general duties of officials (sections 25 to 29 of the PGPA Act);
- fraudulent activity by officials;
- systemic issues reflecting internal control failings or high volume instances of non-compliance
- non-compliance issues that are likely to impact on the Commonwealth entity's financial sustainability.

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Solutions Summary

Lighthouse is a suite of governance, compliance and assurance solutions designed to support all Australian Federal Government agencies operating under the PGPA Act and other Australian government agencies. The solutions are highly configurable to meet agency specific requirements. Solutions include the following;

Solution	Description
Non-Compliance Reporting	Manages instances of non-compliance to any governance framework such as PGPA Act, Accountable Authority Instructions and other internal policy. Provides reports for managers, auditors and other authorised people. Assists with the requirement to implement measures directed at ensuring officials comply with the finance law and to review an entity's compliance.
Non-Compliance Surveying	Survey for instances of non-compliance. Prompts reporting of non-compliance based on targeted survey questions.
General Surveys	Secure collection of any type of information in a survey format. View progress, send reminders, analysis of results.
Assurance Surveys	Secure assurance surveying about any requirement such as Risk Management, Debt Management, Management Assurance Certificates, Credit Card Usage and any form of assurance survey. View progress, send reminders, analysis of results.
On-Line Training	Deliver video based training such as PGPA Act and other training. Includes review questions to assess comprehension.
Official Hospitality / Business Catering Approval and Reporting	Facilitates approval and reporting (FBT, Questions on Notice, etc) of expenditure for official hospitality and business catering – includes delegate workflows.
Motor Vehicle Fleet FBT Reporting	Recording of vehicle operating information for fleet management and FBT liability calculation.

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Home Garaging Approval and Reporting	Approval of home-garaging arrangements with delegate workflows.
Future Year Commitment Approval and Reporting	Efficient process to track and facilitate the approval of future-year expenditure to support the requirement of ensuring financial sustainability. Supports the Secretary in ensuring the financial sustainability of the agency by providing a review point for major commitments before the commitment is authorised. Allows workflows to budget areas, delegates etc.
Contingent Liability Approval and Reporting	Management, approval and reporting of contingent liabilities, such as indemnities, warranties etc. Workflows to delegates for approval.
Accountable Forms Management	Facilitate the management, issue, use and reconciliation of accountable forms such as Cabcharge.
Performance Reporting	Manages corporate performance reporting of deliverables, risks, KPIs, budget and other performance measures within your corporate plan. Makes enterprise performance reporting a simple and transparent process, giving management access to performance information when they need it.
Gifts Register	Records gifts received, associated approvals and reports.

Types of Permissions

A user can access more, or less, functions of Lighthouse depending on the set of permissions they have been given. For example some users may be given permission to edit system wide settings affecting all modules in Lighthouse (referred to as System Administrators), other users may be given permission to set up and edit settings in one particular module (referred to as Module Administrators), other users may be given permission to report or manage a defined set of users (referred to as Supervisors or Managers), while other users may only have access very defined information relating only to their specific situation.

Below is a list of some of the main permissions granted within Lighthouse. However, there are many other permissions available.

1. **System Administrator**
    These users are responsible for maintaining the system wide functions of Lighthouse such as:
    - Organisational Structure
    - User Management
    - Global System Settings that effect all modules
    - Module enable/disable
    - Managing all groups
    - System administrators are also module administrators for all modules.

2. **Module Administrators**
    These users are responsible for managing and maintaining settings for individual modules. The duties of a Module Administrator vary depending on the Module they are responsible for. Detailed duties for the Module Administrators are given at the beginning of each Module chapter in this manual.

3. **Survey Administrators**
    These users have been given permission by either the System Administrators or Module Administrators to create, design and run a survey.

4. **Managers or Supervisors**
    These users may be given permission to view and report on another group of users such that may be relevant to Section, Branch or Division Mangers.

5. **Users**
    Anyone accessing Lighthouse is a user.

    Users may also be given special permissions to perform various tasks in Lighthouse.

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# GETTING STARTED

About Lighthouse

Lighthouse is a web based system, and is subject to the basic rules of all such systems. Some important things to remember:

- Navigating away from a page that has not been saved will discard the changes you have made. However, if you are at risk of losing work, you will be warned and be given the opportunity to cancel the navigation request.

- Web-based systems will automatically log you out after a period of inactivity (30 minutes is the default for Lighthouse). If you have been logged out, the system will prompt you to enter your login details so you can log back in without losing your work.

Registering and Logging In

If you need to log in to Lighthouse you will be presented with a log in screen.

To begin using Lighthouse a user must be a registered. If your agency allows self-registration, select the Click here to register.option from the Login screen.
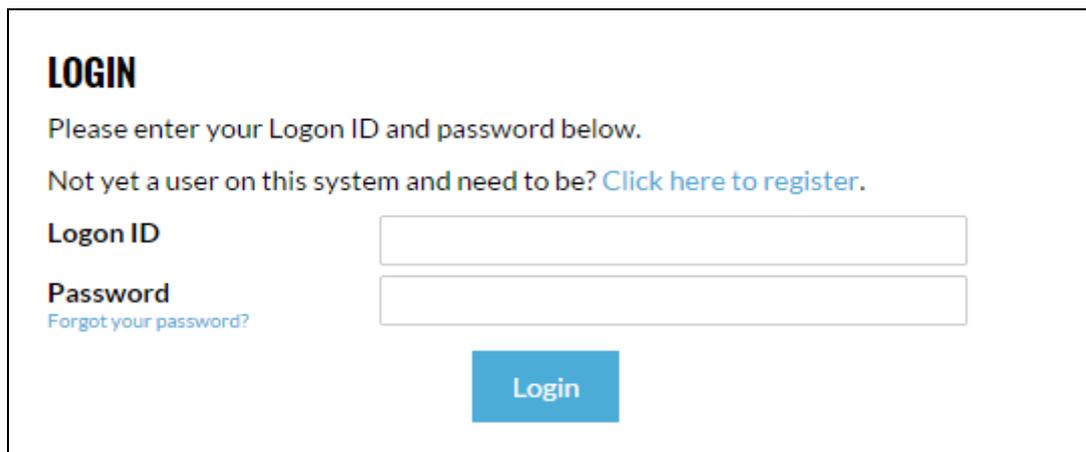
LOGIN

Please enter your Logon ID and password below.

Not yet a user on this system and need to be? Click here to register.

Logon ID

Password
Forgot your password?

Login

All fields are mandatory, so please fill them all in before clicking the Register button. A confirmation message will be sent to your email address.

Some agencies utilise a single point login. That means that once a user has logged into their intranet there is no further requirement to login to each application used.

Other agencies require a separate login for this application, or users may be accessing Lighthouse from remote locations. If this is the case, type your Logon ID and Password into the appropriate boxes and click the Login button.

Note: if you have forgotten your password, ensure your login ID is in the appropriate box and click the Forgot Password link. A temporary login will be emailed to your registered email address.

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Buttons & Icons

Various icons are used to denote functions throughout the system. These are identified below.

Editing

- ✖ **Error** - denotes that the associated element is in an error state. Hovering over this icon will provide you with more information.
- 📅 **Date Selector** - clicking this allows you to graphically select a date for the associated element.
- ⓘ **Help** - clicking this will pop-up context-sensitive help.
- ↗ **Expand/Contract view** - clicking this will expand or contract the amount of information displayed for this field.

Grid Management

- ⊙ and ⊙ **Expand** – drills down the selected row to see child records.
- ➕ **Add** - adds a new record/row.
- ✏ **Edit** - edits the selected row.
- ➖ **Delete** - deletes the selected new record/row.
- 🗐 **Copy** - copies the selected record/row.
- 👁 View Details
- 📄 **Jump To...** - jumps to the detailed view of the selected row.
- ☑ **Update** - saves the changes in an add/edit.
- ⊗ **Cancel** - cancels an edit/update without saving.
- ❗ Mandatory field has not been completed.
- 🔽 Filter Type – allows selection of different filter logics to be applied to a filter when filtering records in a grid display.
- ✖ **Clear Filter** - removes an active filter from a filtered grid.
- 🔑 **Reset Password** - resets the associated user's password and emails it to them.

Home Page

Welcome to Lighthouse – this is Lighthouse Home Page. From here you can view and access all functions you are permitted to use.

In your Home Page, you will only see the modules your agency is licensed to use, and you will only see the relevant menus and items that your login has given you permission to use. For example; only people with Administrator status will see the system administration options.

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There are two different styles of home page now available in Lighthouse: Tile Style and List Style. Which view you see will be configured by your System Administrators; they can even allow users to choose their own style.

Tile Style

The coloured Tiles are a quick visual overview of the work allocated to you in Lighthouse. Many organisations and users find this view a quick visual was of showing how many items they have to action or are currently involved in.
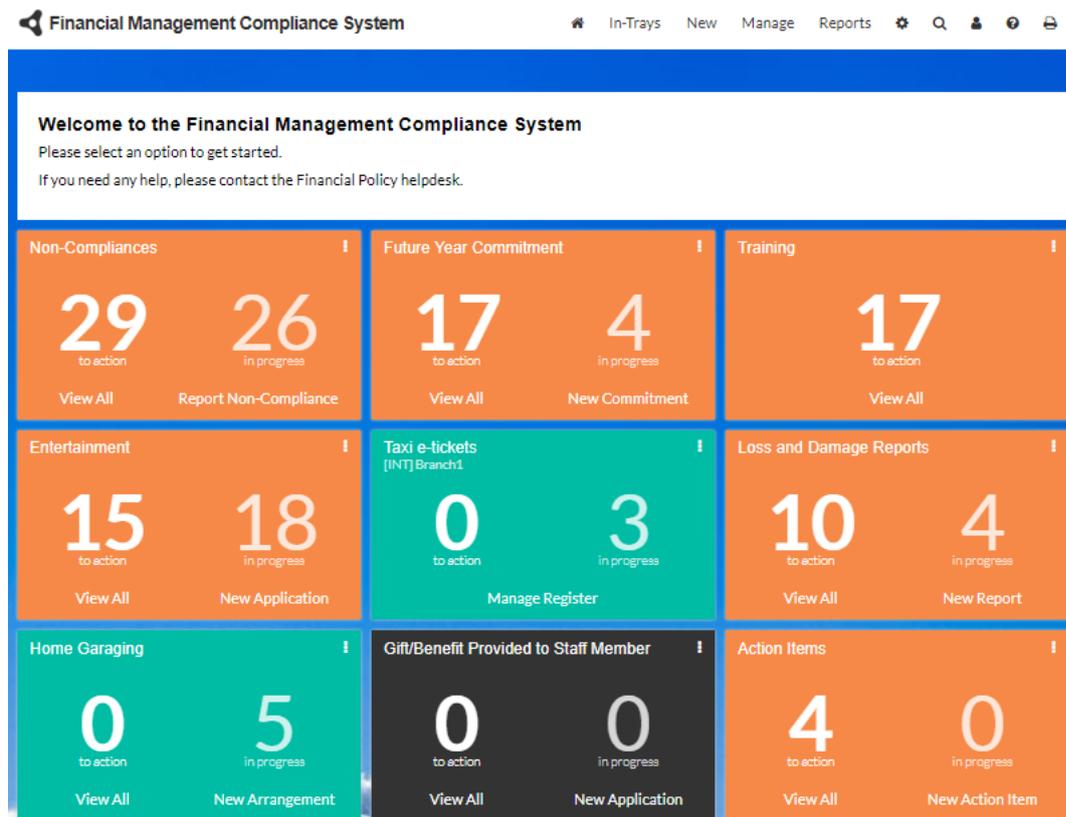
Orange Tiles indicate that there is work in this module requiring your **action**.

Green Tiles indicate that there is work **in progress** in the module that you are involved with, but is pending someone else's **action**.

Black Tiles indicate that no work is requiring your attention in the module.

The numbers in the Tiles tell you how many items in the In-Tray need **action** or are **in progress**. In some instances, due to various levels of permission given, it is not possible to have an item **in progress**, therefore the only numbers displayed are **action** items.

Tiles can be moved to display in any order. Hover the curser over the title of the tile until the four-pointed arrow appears – click and drag to the desired location.
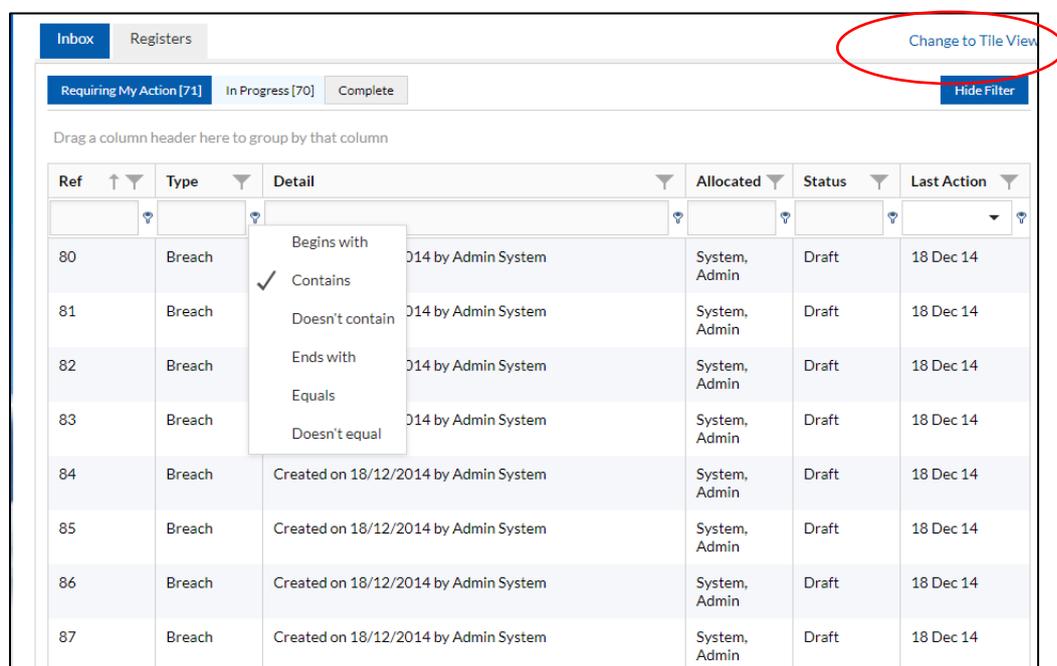
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Filtering and Sorting Tiles

Filter and sort tiles by selecting the ▼ button on the top right side of the home screen.

■ Hide tiles with no items to action
■ Hide tiles with no items
☑ Order tiles by items to action
Change to List View
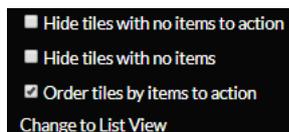
You are also able to change the home screen style to List View if the system administrator has allowed this.

List View

The list view shows all in-tray items in a single list. The list view may be useful when your organisation is licensed to use many modules or users that may only have a few items at any one time.

* Register Tab at top of screen refers to the Module "Asset Registers" and will only be visible if your organisation is using the Accountable Forms module.

Note: The selected display can be printed by selecting the Print Icon at the top of screen.

Choose between displaying items "Requiring My Action", "In Progress" or "Complete" by clicking on the tabs.

Grouping the Display

Items can be displayed by groups by dragging the column header into the space above. For example to display all items by Type of Application, drag the Type header above – then all

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items will appear grouped by type in the display. To undo the grouping, drag the header back into the table.

Filtering the Display

The display can also be filtered. For example, only those items with a status of "Delegate Review" can be displayed by clicking on the filter icon in the Status column header and selecting that option.

Click on the Show Filter/Hide Filter button to bring up more filter options.

The filter type defaults to 'Contains'. To change this default, click on the filter type icon and select the required filter logic to be applied to the filter.

Ordering the Display by Date

Items can also be displayed in order of Last Action from oldest to newest by clicking on the arrow in the header of the Last Action column.

Menu Items

Functions within Lighthouse are available via the menu structure. The functions available to you will depend on the permissions you have been granted. The menu structure is configurable by the system administrator and so may be different for each organisation. However, the following menu items are generally available across the top right of the screen.

 The Home button will bring you back to this Home Page screen from anywhere in the system.

 Menu provides an alternative method for accessing your In-Trays. Note: If you are using list style in-trays, the 'In-Tray' menu item will not display.

 Menu is a quick alternative to start a new item in any of your In-Trays.

 Menu is a quick alternative to jump to any module you are authorised to "Manage".

 This Menu is only available to users who have been given permission to run reports on data collated in Lighthouse.

 System and Module Administrators update System Settings by selecting this button.

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Q Search Functions can be accessed by clicking this button. See Section on Searching for instructions.

👤 If you log on to Lighthouse using a logon and password, your password can be changed by selecting the "My Details" button. You can also log out of your Lighthouse through this function.

Users may view their own permissions by going to **My Details** and selecting **View My Permissions** at the bottom of the page.
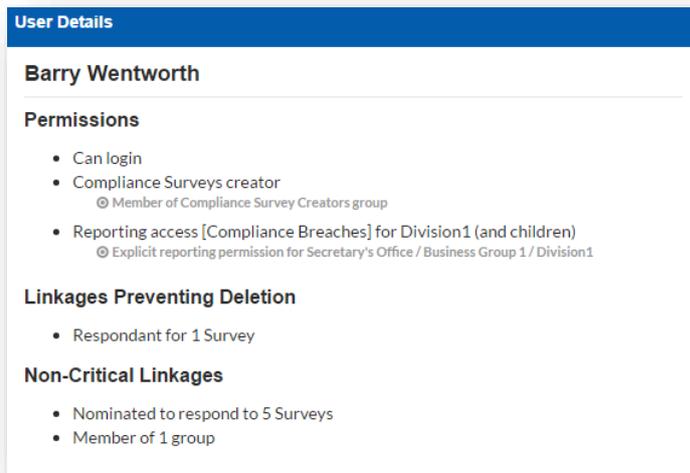

? Context help provides information about fields within Lighthouse. As you hover over the field, the description of the field and other useful information will be displayed. To access Context Help, select the help button in the menu. A Knowledgebase is also accessible through this button. The knowledge base gives step by step instructions on how to perform many of the functions of Lighthouse. The knowledge base can be viewed by selecting the help button in the menu and then selecting Knowledgebase.

🖨 Print allows the user to execute a print of the page that is being viewed.

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All Lighthouse Functions are always available by selecting alt+M and finding the required system function.
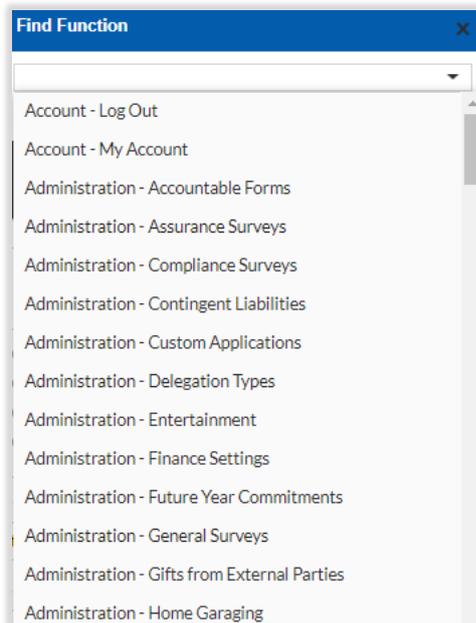
System function names have a prefix indicating the type of function as follows;

Account	Functions related to a user's account.
Administration	System administration functions
In-Tray	In-Tray functions.
Manage	Management functions. E.g. Groups, Reporting Permissions.
New	Functions to create new items.
Reporting	Functions for executing reports.
Search	Functions allowing searching for items.

The system function name follows the prefix. The system function name of on demand surveys/training and application types is the name of the survey/training or application type.

The following special function names are also used.

Print Current Page	Performs the page print function.
Toggle Help	Opens and closes context sensitive help.

In-trays

Your In-trays contain all the work that has been allocated to you. You can access your In-Trays by either clicking on the appropriate Tile, or selecting the appropriate module through the In-Trays menu across the top of the home page.

Once you select an In-tray, the contents of the In-tray will be displayed in more detail. All your work will be categorised in three sections:

1. **Requiring My Action**
   This is work that requires your action to progress.

2. **In Progress**
   This is work, in which you are involved (e.g. for a breach report, you are either the reporter, committer, supervisor or administrator), that is currently in someone else's In-tray awaiting their action before it can be progressed. The current status is displayed.

3. **Complete**
   This is finalised work that shows items in which you were involved (e.g. you are either the reporter, committer or supervisor of a breach report). Administrators must use reporting functionality to view items they were not personally involved with.

Note: There are scroll bars to the side of the categories should there be more items in the category than can be easily displayed on the screen.

At any time, Select the [home icon] button to go back to the Home Page.

Searching

The Search function is accessed by selecting the [search icon] button on the top right side of the Home Page.
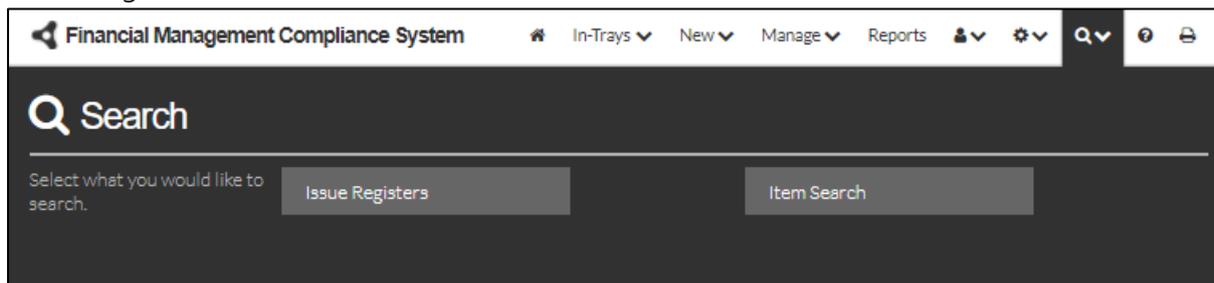
The search function will access items in all applications and modules you have running in Lighthouse regardless of status: ie. Draft, Allocated, Submitted, Finalised. However, to search "Deleted" items, you will need to run a report, which requires "Report" Permission from the System Administrator.

When searching for items, you will only be able to find those items you have permission to view. (See each Module chapter for records you have permission to view.)

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Item Search

This search function allows you to search any, or all, modules you have permission to access searching by number identifier or keywords.   Both search types listed below are performed using the same search box.

Number Identifier Search

Searching for a record by its number identifier is the quickest search method.

1.   Click in the Search field and type in the number identifier you require. Tick the modules that you want to search through. Select the Search Button. All records with that identifier in the selected modules will be displayed below.

2.   Click on the record you wish to view. The record is then displayed on the screen.

Keyword Search

Keyword searches can be slow depending upon the number of records stored in the database. The search is performed on any text entered by users, not pre-entered data such as headings and category titles.

1.   Click in the Search field and type in the keyword or string of words. Tick the modules that you want to search through. Select the Search Button. All records with that text in the selected modules will be displayed below.

2.   Click on the record you wish to view. The record is then displayed on the screen.

Note: If you want to search by category headings you will need to run a report, which requires "Report" Permission from the System Administrator.

Find Issue Register

This option will only appear if you have access to the Accountable Forms Module of Lighthouse.

This search function allows you search for form issue registers by Type, Organisational Structure, Issued To, and allows the results to be displayed in different orders.

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