

TORQUE
SOFTWARE



LIGHTHOUSE USER GUIDE

Item Types

Version 5.8.5

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INTRODUCTION

The Item Types Module is a highly flexible and powerful tool which allows electronic templates to be configured by the system administrator to manage almost any type of action such as tasks, deliverables, KPIs and many other activities. Any number of item type templates can be created. Users can then create items using the templates. Any number of items can be created from an item type template.

Items can be assigned to owners and facilitators for action. The module allows almost any sort of information to be collected and reported. Provides reminder notifications based on various events such as when a due date is close or has been passed. Items can be generated from a *Custom Application* or created stand alone.

The module also includes comprehensive security to ensure only authorised users can edit/view an item.

Item Type templates include several configuration options to allow many different types of items to be created. Configuration options include;

- Any number of custom fields can be configured to collect all the information required. There are numerous field response types available, allowing almost any type of information to be collected.
- Notifications to users who have an interest in the item. Allows configuration of notifications email templates, when notifications should start, recur and end. Notification examples include overdue reminders or planned start date reminders.
- The roles of users who have responsibility for the item. Role examples include Owner, Facilitator, Viewer etc.

Examples of item type templates include;

- Corrective Actions
- Governance Tasks
- Compliance Tasks

Benefits

- ✓ Item types can be quickly configured and implemented as new requirements arise.
- ✓ Comprehensive record of the actions undertaken.
- ✓ Intuitive and easy to use.
- ✓ Enterprise-wide reporting of all items.
- ✓ Items readily available to all authorised users.
- ✓ Reminder notifications ensure items are completed.

ITEM SECTIONS

Items have several sections for the entry or display of information.

The example below shows a typical item created from an item type template. The example item is in the open status which is the first stage of two stages, open and finalised.

Governance/Compliance Task
This app is used to create and manage governance/compliance tasks. Collectively, the tasks create a register that is comprised of all the governance or compliance activities that must be performed over the course of the calendar or financial year.

Identifier: 20053 Actions OPEN

Roles

| Role | Who | |
|-------------|----------------------|--------|
| Owner | Krista Burton (user) | Remove |
| Facilitator | Steve Jones (user) | Remove |

Add Permission

Description (required)
CBMS Update - February 2019

Senior Responsible Officer (SRO) (required)
Krista Burton (krista) krista@torquesoftware.com.au

SRO Organisation Unit (required)
Secretary's Office / Business Group 1 / Division2 / Branch3

Due Date (required)
8/03/2019

Expected Completion Date (required)
8/02/2019

Actual Completion Date

Attachments
No uploaded files.
Browse... Remove
Add

Add Comment Save Finalise

Preamble Section

Orientation Section

Roles Section

Details Section

Action Button Section

Preamble Section

The preamble section is used to provide information about the purpose of the item type 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 item. The orientation section is not configurable. Information includes the following;

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

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

Comments – Allows adding/viewing comments.

Copy – Creates a new item based on a copy of the current item.

Delete – Deletes the item. Items that have not yet been saved will be deleted permanently. Applications that have been saved, will be flagged as deleted and only retrievable by selecting the Deleted status in Item Type reports.

Finalise – Changes the status of the item from Open to Finalised.

Save - Saves the current item values.

View Log – Displays the log records

Reopen – Allows a finalised item to be reopened for editing.

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

Open – The item is available for editing and appears in in-trays.

Finalised – The item is no longer available for editing and is removed from all in-trays. Used when no further action is required.

Deleted – Item has been deleted.

Details Section

The details section contains the information about the item. All the fields in this section are configurable.

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 item.

PERMISSIONS

Roles

Permission to perform actions on items is granted by assigning roles to users. Roles grant either Edit or View permission to the granted users.

Roles may be granted in any of the following ways;

- Adding a user or group in the roles section of the item.
- Configuring a user selection field to grant a role to the user selected when populating the field.
- Assigning global roles in the item type configuration.

Roles granted in these ways provide edit/view permission to all fields in the item.

However, role permissions may be overridden for a particular field by a configuration setting for the field.

Edit Permission

Edit permission allows users to perform the following actions;

- Select the item to view
- Edit/view fields
- Finalise items
- Reopen items
- Delete items
- Report on items

View Permission

Edit permission allows users to perform the following actions;

- Select the item to view
- View fields
- Report on items

Create Item Permission

Items may only be created by users who have been given this permission by the Item Type administrator.

CREATING ITEMS

Items may be created by users with permission to create the item. Items can be created in the following ways;

- From the menu system
- By selecting alt+M and finding "New – <Item Type Name>" where <Item Type Name> is the name of the item type.
E.g. "New - Governance/Compliance Task."
- From a Custom Application where that application allows items to be created.
- By copying an existing item

The fields in an item only include the active fields at the time the item is created. Fields added or inactivated after the item has been created will only effect new items and will have no effect on already existing items.

ACCESSING ITEMS

Items may be accessed by users with the appropriate permission either from their in-tray or via the Report Builder. The item in-tray can be accessed from the menu system or by selecting alt+M and finding "In-tray – <Item Type Name>" where <Item Type Name> is the name of the item type.

E.g. "In-Tray - Governance/Compliance Task"

IN-TRAYS

Items appear in the in-trays of users who have been assigned a role for the item, and where the assigned role is configured for in-tray display.

To Action In-Tray

Open items in the To Action in-tray.

In Progress In-Tray

The In Progress in-tray is not used by item types.

Complete In-Tray

Finalised items appear in the Complete in-tray.

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

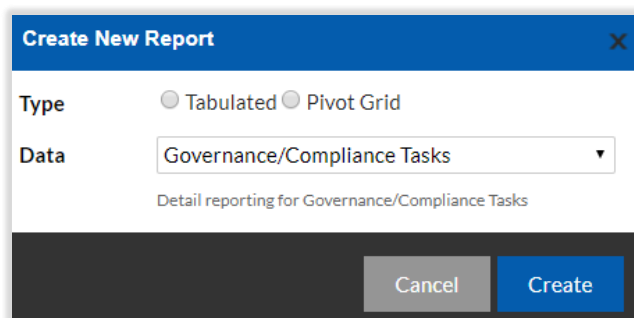
ITEM REPORTS

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

Identifier – Unique identifier for the item.

Status – Status of the item, Open or Finalised.

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



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

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

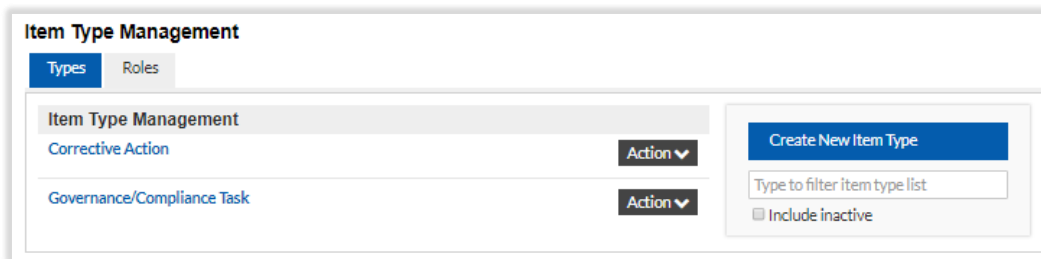
ITEM TYPE CONFIGURATION

Item type configuration can be accessed by selecting alt+M and finding "Administration – Items". It is recommended a menu item also be configured to access item type configuration.

Types

New items types can be created, and existing item types can be modified.

New item types may only be created by members of the group selected as Item Type managers in System Settings > Permissions/Workflow.



Roles

The roles tab lists all the roles available. Roles are global to all item types. The roles used by a particular Item Type are selected when configuring the Item Type.

Roles may only be configured by members of the group selected as Item Type managers in System Settings > Permissions/Workflow.

The screenshot shows the 'Item Type Management' interface with the 'Roles' tab selected. It displays a table of roles with the following columns: #, Name, Start, End, Permissions, and Sort Order.

| # | Name | Start | End | Permissions | Sort Order |
|-------|----------------------------|-------|-----|-------------|------------|
| 🔍 + - | Administrator | | | Edit, View | |
| 🔍 + - | Corrective Actions Manager | | | Edit | |
| 🔍 + - | Editor | | | Edit | |
| 🔍 + - | Risk Owner | | | View | |
| 🔍 + - | Owner | | | Edit | 100 |
| 🔍 + - | Owner's Delegate | | | Edit | 150 |
| 🔍 + - | Facilitator | | | Edit | 200 |
| 🔍 + - | Viewer | | | View | 300 |

A role has the following settings;

Name – the name of the role to be displayed.

Effective from/to – the period the role is effective. Both the from date and to date are optional.

Default Permissions – roles may be assigned edit or view permission.

Sort Order – the order the role will be listed in lookup lists and in the roles section.

Configuring New Item Type Templates

When a new item type template is created, Type configuration must be completed and saved before other configuration options are available.

Item Type Configuration Tabs

Item type configurable settings are grouped into several tabs.

The screenshot displays the 'Governance/Compliance Task Settings' interface with the 'Type' tab selected. The page title is 'Governance/Compliance Task Settings' and the sub-header is 'Modify the basic settings for this item type.' A 'Save' button is located in the top right corner. The configuration fields are as follows:

- Name (required):** Governance/Compliance Task. Description: The name of this item type.
- Singular (required):** Governance/Compliance Task. Description: The name of a single instance of this item type, e.g. "Task".
- Plural (required):** Governance/Compliance Tasks. Description: The name of this item type in aggregate, e.g. "Tasks".
- Note:** The menu options for items of this type are managed by the system administrator via menu management in system settings. Contact the system administrator to request this item to be included as a menu option.
- Available From:** [Empty field]. Description: Leave blank to be available immediately.
- Available To:** [Empty field]. Description: Leave blank to be available indefinitely.
- Creators (required):** Everyone. Description: This group contains the members who can create items of this type.
- Type configuration (required):** System Administrators. Description: This group contains the members who can administer this type.
- Preamble:** This preamble appears at the top of the form for all items of this type. The editor shows the following text: **Governance/Compliance Task**
This app is used to create and manage governance/compliance tasks. Collectively, the tasks create a register that is comprised of all the governance or compliance activities that must be performed over the course of the calendar or financial year.

Permissions/Workflow Tab

Name – Name of the item type.

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

Plural – Name used when referring to multiple items.

Available From –Items will not be available to be created or viewed until this date. May be left blank.

Available To –Items will not be available to be created or viewed after this date. May be left blank.

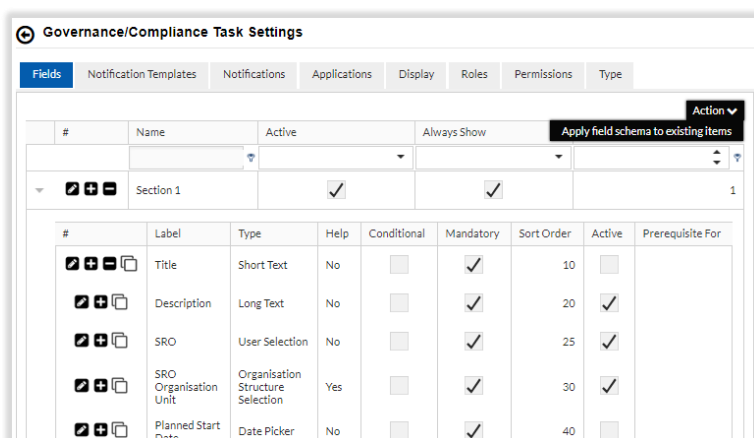
Creators – The group who can create items.

Type configuration – The group who can configure the item type. Note: item type managers (assigned in system settings) have permission to configure any item type, irrespective of this setting.

Preamble – The text appearing in the preamble section. Allows any html value.

Fields Tab

Fields allow the collection of almost any type of information within an item. There is no limit to the number of fields in an item.



| # | Name | Active | Always Show | Action |
|---|-----------|-------------------------------------|-------------------------------------|--------|
| | Section 1 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | 1 |

| # | Label | Type | Help | Conditional | Mandatory | Sort Order | Active | Prerequisite For |
|---|-----------------------|----------------------------------|------|--------------------------|-------------------------------------|------------|-------------------------------------|------------------|
| | Title | Short Text | No | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 10 | <input type="checkbox"/> | |
| | Description | Long Text | No | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 20 | <input checked="" type="checkbox"/> | |
| | SRO | User Selection | No | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 25 | <input checked="" type="checkbox"/> | |
| | SRO Organisation Unit | Organisation Structure Selection | Yes | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 30 | <input checked="" type="checkbox"/> | |
| | Planned Start Date | Date Picker | No | <input type="checkbox"/> | <input checked="" type="checkbox"/> | 40 | <input type="checkbox"/> | |

Action Button

The Action button provides the **Apply field schema to existing applications** option. This will update existing open items with any changes made to custom fields. An option allows existing finalised items to also be updated.

Sections

Any number of sections may be created. Fields are contained within sections. A section has the following settings;

Name – name of the section. The name is only used to identify the section and is not used anywhere else.

Preamble – text to appear prior to the section.

Active – indicates if the section is to be displayed.

Always Show – forces the section to display even if there are no active fields in the section.

Sort Order – the order the section will display in.

Fields

Fields have the following settings. Note: some settings are only available depending on the answer type selected.

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

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

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;

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

Long Text – Allows a large amount of free text.

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

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.

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.

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

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

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

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.

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

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.

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

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.

Minimum Value – The minimum value the field may contain. A validation error will occur if this condition is not met.

Maximum Value – The maximum value the field may contain. A validation error will occur if this condition is not met.

Default Value – The field will be prefilled with this value when a new item is created.

Input Mask – The 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.

Group – Allows only members of a group to be selected in User Selection response type fields.

Influences Permissions – The organisation selected will be used to determine organisation unit based permissions.

Permissions – Allows the following permissions to be granted;

Grant Role – Grants the role to the selected user.

Same as role – Indicates users with the role will have the same edit/view permissions for the field as the role.

Edit – Grants edit access to the field, irrespective of any other role permissions a user may have.

View – Grants view only access to the field, irrespective of any other role permissions a user may have.

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.

The screenshot shows a configuration panel titled "Validation required". At the top right, there is a checked checkbox labeled "Indicates this field will invoke custom validation". Below this, the "Required Value" section features a dropdown menu with an equals sign (=) selected and a text input field. The text below the dropdown reads "Enter default value(s) - for multi-select enter one per line." The "Validation message" section has a text input field with the instruction "Show to user when field fails validation."

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 item 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.

The screenshot shows a 'Conditional' configuration panel. At the top, there is a checked checkbox labeled 'Indicates this field will appear based on conditional field values'. Below this is a 'Precondition Question' dropdown menu. The 'Single/Multiselect' section contains a 'Show when' section with two radio buttons: 'Any value is selected' (which is selected) and 'All values are selected'. Below this is a 'Values' text area with a placeholder instruction: 'Type the condition value(s). Value must match exactly the option(s) available in the precondition question.' The 'Date' section has two rows: 'Show on or after' and 'Show on or before', each with a date picker icon. The 'Numeric' section has two rows: 'Show at or over' and 'Show at or under', each with a numeric spinner icon. The 'Risk Level' section has a 'Risk Type' dropdown menu and two rows: 'Show at or over' and 'Show at or under', each with a numeric spinner icon.

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 Risk answer types, enter the applicable risk level or risk rating.

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 item.

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

Mandatory – Forces the field to be populated.

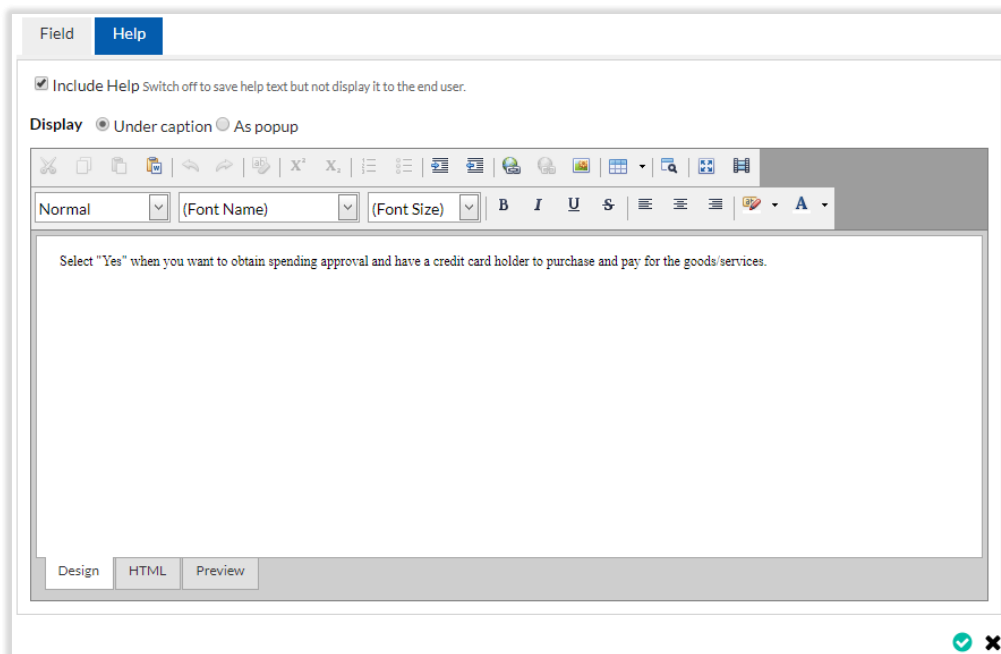
Sort Order – The order the field will display on the item screen.

Active – When an item is created, only fields active at the time of creation will be included in the item. If the field is made inactive, the field will remain in any items 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.



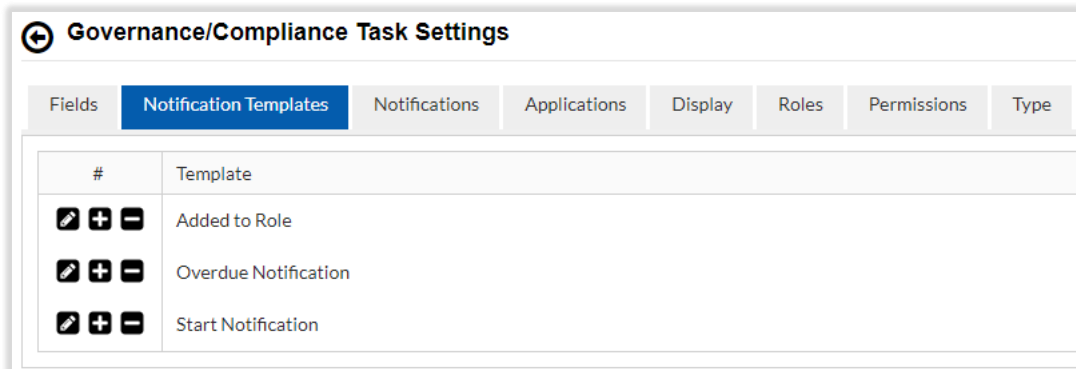
Display configures how the help will be presented.










Under caption – Displays the help under the caption of the field.

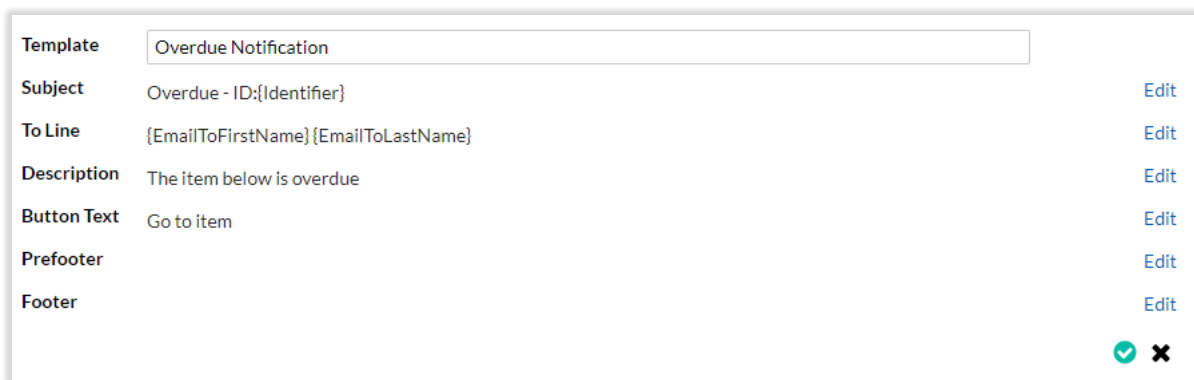
As Popup – Displays help icon ⓘ at the end of the caption. The help text will be displayed when the icon is selected.

Notification Templates

Allows the templates used for notification emails to be configured.



| # | Template |
|---|----------------------|
|    | Added to Role |
|    | Overdue Notification |
|    | Start Notification |



Template: Overdue Notification

Subject: Overdue - ID:{Identifier} [Edit](#)

To Line: {EmailToFirstName} {EmailToLastName} [Edit](#)

Description: The item below is overdue [Edit](#)

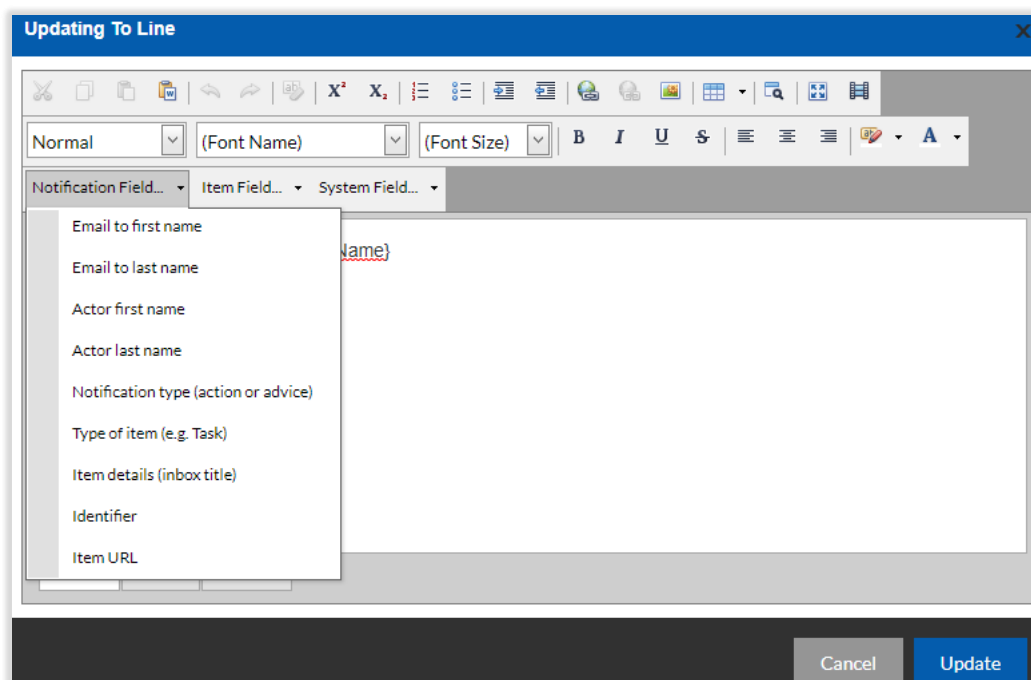
Button Text: Go to item [Edit](#)

Prefooter: [Edit](#)

Footer: [Edit](#)

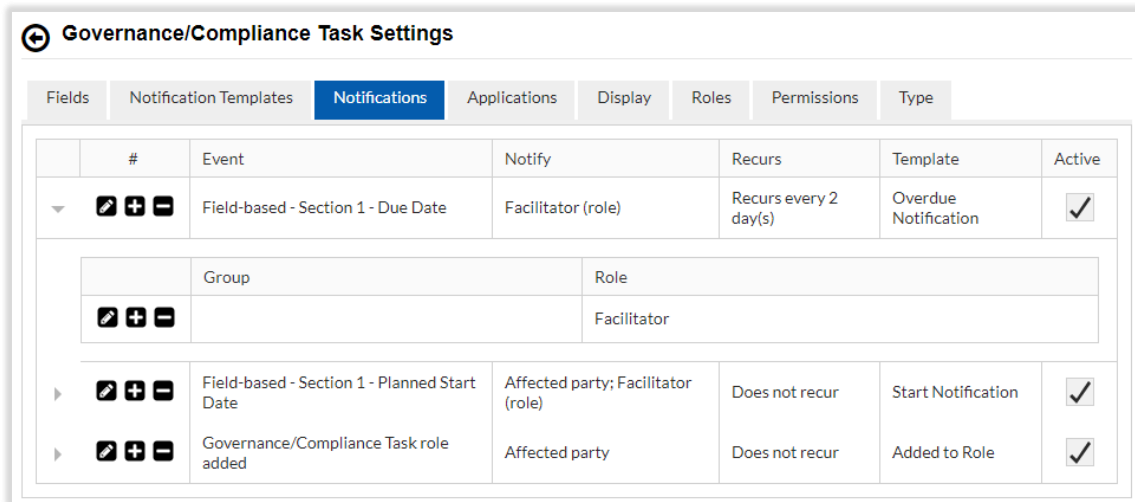
[✓](#) [✕](#)

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.



Notifications

Configures the schedule for sending notification emails.



The screenshot shows the 'Governance/Compliance Task Settings' interface with the 'Notifications' tab selected. The interface includes a table with columns for '#', 'Event', 'Notify', 'Rekurs', 'Template', and 'Active'. There are also sub-tables for 'Group' and 'Role'.

| # | Event | Notify | Rekurs | Template | Active |
|-------|--|------------------------------------|-----------------------|----------------------|-------------------------------------|
| ▼ | Field-based - Section 1 - Due Date | Facilitator (role) | Rekurs every 2 day(s) | Overdue Notification | <input checked="" type="checkbox"/> |
| Group | | Role | | | |
| | | Facilitator | | | |
| ▶ | Field-based - Section 1 - Planned Start Date | Affected party; Facilitator (role) | Does not recur | Start Notification | <input checked="" type="checkbox"/> |
| ▶ | Governance/Compliance Task role added | Affected party | Does not recur | Added to Role | <input checked="" type="checkbox"/> |

The roles the notification is sent to are configured by selecting the grey arrow to the left of the notification.



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.

Event Details

Event:*

Event date field:

Start offset interval:*

Start offset:*

Use merge field for start offset:

Template

Notification template:*

Recurrence

Recurrent notification:

Recurrence Pattern

Recurrence interval:

Recur every:

Use merge field for recurrence frequency:

End Recurrence

End when finalised:

End after (occurrences):

End when date field value reached:

Date field:

Date field offset interval:

Date field offset:

Status

Active:

Event – Identifies the event causing the initial notification to be sent.

Field-based

- Field-based
- Governance/Compliance Task completed
- Governance/Compliance Task created
- Governance/Compliance Task deleted
- Governance/Compliance Task reopened
- Governance/Compliance Task role added
- Governance/Compliance Task role removed

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.

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

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 – Inactive notifications are not sent.

Applications

Allows selection of the Custom Applications the Item Type can be linked to. Selected custom applications will contain a section for managing the items linked to the custom application.

Display

Allows entry of fixed text or merge fields to be displayed in in-trays. Fields are included by surrounding the label of the field with braces. E.g. {Description}.

Governance/Compliance Task Settings

Fields | Notification Templates | Notifications | Applications | **Display** | Roles | Permissions | Type

Manage where [Plural] appear for creation and linkage. Save

Inbox title
Use field labels in curly braces e.g. {Description} {Subject} {Person}

Inbox subtitle
Use field labels in curly braces e.g. {Organisation Structure}

Intray meta field 1 ▼

Intray meta field 2 ▼

Intray meta field 3 ▼

Intray meta field 4 ▼

Inbox title – is displayed at the top left. If this field is left blank the item type name and the record identifier will be displayed (as in example below).

Inbox subtitle – is displayed under the inbox title at the top left.

Any field can be used as a merge field in for Inbox Title and Inbox subtitle. To include a field as a merge field, enter the field label, surrounded by {}. E.g. {Due Date}. To include the identifier of the item type, use {Identifier}.

Intray meta field 1 through 4 are displayed on the right hand side of the in-tray item.

Governance/Compliance Task 20055
CBMS Update - February 2019

Planned Start Date **8/02/2019**
Due Date **8/03/2019**

Expected Completion Date **28/02/2019**
Actual Completion Date **26/02/2019**

Roles

Selects the role applicable to the item type and how they operate.

Governance/Compliance Task Settings

Fields | Notification Templates | Notifications | Applications | Display | **Roles** | Permissions | Type

Nominate which roles are used in this type. Save

| Role | Applicable | Show in My Action | Granted to creator | Mandatory | Can Allocate Roles |
|----------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Administrator | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Corrective Actions Manager | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Editor | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Risk Owner | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Owner | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Owner's Delegate | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Facilitator | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Viewer | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

The following options are available.

Applicable – The role is selectable when granting roles for items.

Show in My Action – Items will show in the in-tray of users with the selected role.

Granted to creator – The role is automatically granted to the creator of an item.

Mandatory – The role must be granted to at least one user.

Can Allocate Roles – Users granted the role may also grant roles to other users.

Permissions









Allows roles to be granted to users. This is in addition to roles granted to specific items.

Governance/Compliance Task Settings

Fields | Notification Templates | Notifications | Applications | Display | Roles | **Permissions** | Type

Manage all role permissions for Governance/Compliance Tasks.


Drag a column header here to group by that column


| # | Granted Role | Granted User(s) | Granted Records | Active From | Active To |
|---|---------------|-------------------------------|--|-------------|-----------|
| | | | | | |
|     | Administrator | System Administrators (group) | All | | |
|     | Viewer | All | Supervised Organisation Unit(s) [Inc. Lower] | | |

Granted Role

Role:* Administrator

Granted Users

User: (none selected) 

Group: System Administrators 

Organisation Unit:

Granted Records

Own Organisation Unit:



Supervised Organisation Unit(s):

Specific Organisation Unit
Leave blank for all:

Applies

Active From:

Active To:

The following options are available.

Role – The role to be granted.

Granted Users

Identifies the users who will be granted the role.

User – Grants the role an individual user.

Group – Grants the role to a group.

Organisation Unit – Grants the role to the users in an organisation unit. If selected the following options are also available;

Lower Levels – Also grants the role to organisation units below the selected organisation unit.

Supervisor(s) Only – Only grants the role to user who is nominated as the supervisor of the organisation unit.

Granted Records

Identifies the records granted to the users. Leave these options blank to grant all records.

Note: a field with an organisation unit selection response type, with Influences permission checked, must be configured to grant organisation unit based permissions.

Own Organisation Unit – Grants records in the organisation unit of the granted user. If selected, an option to also grant records in organisation units below the user's organisation is provided.

Supervised Organisation Unit(s) – Grants records in the organisation unit of the organisation unit(s) the granted user supervises. If selected, an option to also grant records in organisation units below the organisation unit the user supervises.

Specific Organisation Unit – Grants records in the selected organisation unit

Applies

Allows the role to only be granted for a specific date range.

Active from – Role is only granted on or after the date. May be left blank.

Active to – Role is only granted on or before the date. May be left blank.

ITEM TYPE MENU ITEMS

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

Configuration Settings Menu Item – "Administration – Items"

Intray Menu Item – "In-Tray – " & Name where Name is the name in the permissions/workflow tab. E.g. "In-Tray – Governance/Compliance Task".

New Menu Item – "New – " & Name where Name is the name in the permissions/workflow tab. E.g. "New - Governance/Compliance Task".

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

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