TORQUE
SOFTWARE

LIGHTHOUSE RELEASE NOTES

Versions 6.0 and later

CONTENTS

VERSION 6.1.3

Custom Forms

- Fixed an issue where delegates with higher level spending authority where not selectable to approve for lower level spending amounts.

VERSION 6.1.2

System

- Fixed an issue where default supervisor was sometimes not being calculated correctly.

VERSION 6.1.1

System

- Fixed an issue where users to be kept current for user imports were not kept current.

VERSION 6.1.0

Custom Forms

- Additional contacts now available as a column in custom form reports.
- May now configure the label to appear for an authority in the workflow section. Previously the label for an authority was always the name of the authority.
- May now configure the status to appear at the top of the form when pending the action of an authority. Previously the status always showed “Pending Review”.
- May now send test emails for Notifications when configuring custom forms.
- New option to refresh the workflow of existing forms to match current configuration.
- Now loads configuration screen much faster.
- Fixed an issue where the name of a copied break type custom field was set to “Copy of Break” instead of just “Break”.
- Fixed an issue where a custom field is copied that is conditional on a lookup, the conditional lookup value was not copied.

- Fixed an issue where sometimes the search button for the approval person would not work.
- Fixed an issue where the help for transaction fees was not displaying correctly.
- Fixed an issue where sometimes the Active field was hidden.

Non-Compliances

- Procurement Value now available as a standard column in non-compliance reports.
- Notification Reply to Email Address no longer available for cloud hosted instances.
- Fixed an issue caused when adding questions containing html to the question bank.

Surveys

- New Manager Access option to disallow submission until all subordinates have submitted a response.
- Notification Reply to Email Address no longer available for cloud hosted instances.
- Fixed an issue caused when adding questions containing html to the question bank.

Gifts and Benefits

- External recipient related fields now available as merge fields in notifications.

Forward Year Commitments

- Fixed an issue where administrator comments were not persisting on save for unlocked records.
- Fixed issue where unlocking and saving cleared the organisation unit, and user was unable to select/change org units when unlocked.

Contingent Liabilities

- Fixed issue where application could be submitted by applicant a second time after initial submission.
- Fixed issue where application could be submitted by the delegate prior to admin review completion.

System

- Extensive improvements to how data connections are managed for importing users and organisation structures, providing significantly more flexibility in the format definition of import files, the location where they are sourced (API, network location or browse for file) and when they are scheduled to run.

- Excel files may now be used to import users and organisation units (previously only csv format allowed).
- New permission available in system settings to allow users to create data connections.
- May now explicitly nominate a user's manager which overrides the user's organisation unit supervisor when defaulting a user's supervisor.
- Updates to the license and disable/enable of modules are now logged.
- The "Everyone" group renamed to "All Active Users" and may now be maintained the same way as other groups.
- Cost centres may now be imported and exported.
- GL codes may now be imported and exported.
- Bounce Address no longer available for cloud hosted instances.
- Fixed issue where not all additions and deletions of group members where being logged.
- Fixed issue where deleting a lookup value that has been used causes an error (can no longer select these values for deletion).
- User records used by Torque Software help desk staff are no longer counted in licensed user count and are not selectable in user searches.

VERSION 6.0.7

Custom Forms

- Configuration setting now available to allow negative values for expenditure and payment amounts.
- Fields in settings and expenditure tabs rearranged.
- All expenditure fields except expenditure type and amount may now be hidden in expenditure and/or payments.
- New project code expenditure field.
- New additional expenditure fields for general purpose use.
- Additional contacts section name can now be configured.
- Additional contacts now have configurable help text.

- New configuration options to allow the additional contacts section to be hidden or available from menu only.
- Additional contacts section can be maximised/minimised.
- Answer types Single Select and Multi Select are now longer available and lookups are now used instead.
- Notification sort order now included in template import and export
- Fixed issue where deleted custom forms incorrectly showed status as Completed.
- No longer saves a redundant log record when deleting a form.
- Fixed issue where the configured help for expenditure was not showing.

Entertainment

- Completion Date now included in custom reports.
- Name of Application Date field in reports changed to "Applicant Submit Date".
- Fixed issue where updates to the stage setting where not being saved.

Gifts/Benefits

- "No further action required." Text removed from "Offer declined by recipient." in offer status.
- Fixed issue where incorrect error message provided when updating Actions.
- Fixed issue where reminder notifications could not be turned off.

Non-Compliances

- New configurable option to not default supervisor.
- Longer names (up to 100 characters) now allowed for custom fields.
- Help now configurable for custom fields.
- Compliance survey questions now flag questions that are linked to duplicate categories/questions.
- Now prevents teams from being deleted if they have been used.

Custom Reports

- New Survey/Training Participant Status dataset allows cross survey reporting of participants.
- Users dataset now available.

System

- Group types removed. New groups now created for each group type, which now contain the groups for that type.
- Several new options to filter the group management list by user member/administrator and the usage of the group.
- Classifications may now be imported with users if they are not already recorded in the system.
- New function to merge duplicate users in user maintenance.
- Users may be given alternate logons allowing login by either logon.
- Contact No. field changed to “Contact Phone”.
- Dashboard style now defaults to System Default for new users.
- Locked date no longer displays on user maintenance screen.
- “TEST/TRAINING” added to header of all email notifications when in test mode.
- System wide change to use the new Lighthouse name.
- Notification now sent to system administrators if an automatic user import has not executed in the expected timeframe.
- All user imports are now logged.
- New configuration permission to nominate the Vendor Help Desk Team. Used to identify users who are Torque Software help desk team members. Users are not selectable in user lookup and do not count in current user license count.
- System menus may now go down to four levels.
- Fixed issues which sometimes caused invalid view state error messages.
- Increased session timeout period.

VERSION 6.0.6

Custom Forms

- Help in custom fields now defaults to be under caption.
- Mouse wheel has been deactivated in numeric fields to prevent accidental changes.
- Authorities now sort in alpha order by default.
- Custom fields in notification templates are now scrollable and sort in alpha order.

- Custom fields in notification templates now exclude break and note fields.
- Action menu now includes add field option in custom fields.
- Fixed issue when editing a custom field, the screen could not be scrolled.
- Fixed issue where deleting a custom form template which had a linked custom report caused an error.
- Fixed an issue where sometimes users had access to the approval screen even though they were not in the group with approval permission.
- Fixed an issue where the list of custom fields in notification templates was not scrollable.
- Fixed issue where the label for note fields would be incorrectly overwritten with "Note".
- Users who have configuration permission to inactive custom form templates will now be able to access them via the menu.

Custom Reports

- Add fields popup now automatically displays when a new report is created.
- Date fields now available in YYYYMMDD format.

Non-Compliance

- May now configure default values for "How did the non-compliance occur", based on the selected category.
- May now configure default text to be appended to the administrator comments, based on the selected category.
- Fixed issues where some recipients were not receiving email notifications.

Surveys

- Users may now select a button to view the reason a non-compliance has appeared in their survey.
- Survey responses must now be reopened before they can be deleted.
- Log records for deleted responses are no longer deleted and instead are migrated to the survey log.
- Log records now include the tag field.

Entertainment

- Venue address can now be configured to always be required.

- Custom fields now available (same as custom fields in custom forms).
- All data now encrypted.
- Included a break before the alcohol section.
- Fixed issue where alcohol approval outcome was being incorrectly reported in notifications.

Items

- Several response time improvements.
- Items were not honouring risk levels as prerequisites.
- Field editing now scrolls correctly.

System

- Group member criteria now orders by criteria type.
- Can no longer configure duplicate group set criteria.
- Preconfigured callouts now available in HTML editors for Information, Warning and Alert.
- Organisation unit selectors now work much faster.
- Attachments now only show one upload option initially.
- The last modified date of automatically imported user files is now shown in the auto upload settings.
- Fixed issue where in-trays complete section was not showing anything when show completed set to all
- Fixed issue where error was occurring when attempting to delete a group that had been used a criteria in another group.

VERSION 6.0.5

Custom Forms

- No longer allows payments to be progressed against a finalised spending approval that has been returned to draft.

Surveys

- Invitations and reminders will not be sent to managers who have subordinates with incomplete surveys and where Restrict Manager Access is turned on.

- Improved logging of survey notifications.
- Fixed issue where invitations were being sent even though the notification was turned off.

Non-Compliance

- Notifications are sent to the committer even if they are also the submitter.

System

- Import users no longer disables users if they are the administrators of the System Administrators group.
- Significantly reduced time required to import users.
- Included new preferred salutation field for users.
- Fixed view state errors which sometimes occurred on login.

VERSION 6.0.4

Custom Forms

- Submit action is now logged.
- Fixed error that occurs when actioning an authority if the authority questions have been changed.
- Fixed issue where search results sometimes displayed an incorrect Status value.
- Group permissions now refreshed when custom form is imported.
- Reporting permissions now override the Restrict Access setting.

Custom Surveys

- Exception report now includes the Tag field.
- Fixed error which sometimes occurred when creating new surveys.

Custom Reports

- Default sort order is now the last action date.
- Improved response time.

Entertainment

- New configurable option to include an alternate contact.

Vehicles

- Form stocktakes now show submit button correctly (previously was only showing submit button when current user had at least one stocktake for a register they controlled).

System

- Search now includes Select All option
- Improved response time for searches.
- Improved response time for dashboard.
- No longer emails to users in a group who have “do not email” selected.
- Fixed issue when change filter values in user maintenance and adding/editing.
- Can now restrict users who can log in via logon and password to a nominated group.
- Single Sign On can now be configured via Azure Active Directory.

VERSION 6.0.3

Custom Forms

- Included borders around the expense fields in the expenses grid to make them easier to see.

Surveys

- Fixed issue when the owner of a survey is changed to be the same as the previous delegate, the new owner could not submit.

VERSION 6.0.2

Custom Forms

- Form log display is now scrollable.
- Improved HTML editor.

- HTML editor no longer allows changes to font, font size, fore colour or back colour to prevent invalid html tags.
- Form Id field now called "Identifier".
- Parent Form Id now called "Parent Identifier"
- Fixed issue where the supervisor was not being defaulted correctly in workflow authorities.
- Fixed issue when insert link popup in html editor positions incorrectly.

Custom Reports

- Improved response time when designing reports.
- New Select Fields function which selects the dataset fields to be available in a report. This improves response time by reducing the number of fields the report has to manage.
- Reports now cache data on open to improve response time. Data will only be refreshed when the new Refresh Data action is performed.
- Filter Builder now displays at top of report instead of bottom.
- Field selection in filter builder is now scrollable when large number of fields are available.
- View filter screen no longer displays by default.

Entertainment

- Alcohol approval outcome merge field now shows "not reviewed" and "not required" as appropriate.

System

- Help icon now opens Torque Software user guide download page.

VERSION 6.0.1

Version 6.0.1 is a major release with significant improvements to the Customisable Applications module and Reporting Permissions. The Customisable Applications module has also been renamed the Custom Forms module and is referred to as this name in the version 6.0.1 release notes.

Custom Forms

- Customisable applications module renamed Custom Forms module.

- Application Types renamed to Custom Form Templates.
- Orientation section now appears at the top of the form with Additional Contacts section immediately below (if configured).
- Application preamble migrated to a Note custom field named Form Preamble which appears as the first custom field on the form.
- Subject Person, Organisation Unit, Short Title, Description, Business Case fixed fields removed and migrated to custom fields.
- Show Additional Attachments option migrated to a custom field.
- New answer type of “Break” which creates a clear break in the form. Note: this function was previously performed by appending “Heading” to the label of a note field.
- Appending “Heading” to the label of a note field no longer creates a clear break in the form.
- All Instruction configuration removed from the Wording tab and are no longer used.
- Wording tab renamed to Declarations and now only contains the submitter and authoriser declarations.
- Custom field configuration now hides fields not relevant to the selected answer type.
- Organisation structure selection answer type renamed to Organisation Unit.
- Organisation Unit answer type custom fields can now be configured to default to the organisation unit of the user selected in a user selection answer type custom field.
- User selection answer type custom field can now be configured so that the selected user must submit.
- User selection answer type custom field can now be configured to default to the person who created the form.
- Application Link answer type name changed to Form Reference.
- Proposal Id field name changed to Form Id.
- Application Parent field name changed to Parent Form Id.
- Show defined Term, Show Expiry Date, Show Commitment, Show Existing Approved Applications, Show Risk Assessment, Is a Contingent Liability, Hide Contingent Liabilities options deleted and no longer available.
- All expenditure and payment related configuration settings now in a new Expenditure tab.
- Permissions/Workflow tab renamed to Settings and moved to the first tab position.
- Show Additional Contacts, Authority Title, Default Decision Date and Allow Amendments settings moved to Settings tab.

- Positions of configurations tabs changed.
- Can now create new forms from the Custom Form Template configuration screen.
- Reference field is now available in custom reports.
- Identifier label in orientation section now named Reference to properly reflect the actual field being displayed.
- Organisation unit criteria option removed from Custom Form reports.
- Proposal Status merge field name changed to Status.
- Reporting permissions may now be granted based on any Organisation Unit or Lookup custom field.
- Fixed issue where files uploaded in unlocked completed records were not saved correctly.

Custom Reports

- New action item available to display url links to PDF and Excel versions of the report.
- User AGS now available in custom reports.
- Quarters ago, months ago, weeks ago and days ago now available for date field types.
- Fixed issue where sometimes columns would not save in the correct order.
- Fixed issue where column name change settings were not being copies when performing Save As.

Entertainment

- Custom fields can no longer be deleted if data has been entered for the field.
- New option to configure custom fields to only display at reconciliation stage.
- Fixed issue where changes to the active flag sometimes did not save.

System

- New Notifications function to allow configuration of system notifications to be sent by email on a specified schedule.
- Reporting permissions may now be granted to the organisation unit a user supervises or to a user's own organisation unit.
- Global supervisor permissions migrated to a separate reporting permission for each module.

- Reporting permissions may now be granted based on any Organisation Unit or Lookup custom field in a custom form.
- Fixed issue where some in-tray menu items appeared even though not licensed.

Torque Software are specialists in developing financial compliance software for the Australian Federal Government.

To learn more about Torque Software, contact us on 1300 795 581 or visit www.torquesoftware.com.au.

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