



IPSUF - 2025

UX – Tips and Tricks

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Are you accessing all your available functionality???

Have you signed SaaS??

- Access up to 182 Authorised Functions
- Contact your Account Manager to arrange access to required functions

Are you accessing all your available functionality???

Check Application/Licensing Classes

Have you assigned what's available for use?

Applications >> Application Classes >> Select relevant class >> options >> Class and Group Parameters

← Assign Application Parameter Options Save

Class Parameter Maintenance / Assign Application Parameter Options

Class Description

Description

Planning Permits

Available	Assigned
Description [A] ▼	Description [A] ▼
Contribution Plan Fee	Application Type
Dev. & Financial Contributions	Authority
Fee Group	Building Classification
Application Fee Regime	Building Type
Hierarchy	Cashier Warnings
Payment Timing	Component
Notice Category	Condition Group
NSW Building Professionals Board Extract	Condition Type
Planning Permit Activity Reporting System (PPARS)	Application Fee
	Construction Code

All items on the “Available” side are optional for use but not currently available to the users. Assign them across to access more functionality.

Refunds – Are you using Direct Deposits

Refund System Parameter Maintenance

Homepage / Refund System Parameter Maintenance

Accounts Payable Interface Details

Accounts Payable Refund Creditor Number

99-93-642

Maximum Length for Refund Payee Name *

50

Direct Deposit Details

Format

Australia

☒ Validate BSB

Refund Entry

Refund / Refund Reversal

Module *

Transaction Amount

0.00

Required

Module Reference *

Q →

Required

Name Selection (0 results)

+ New → Details ...

Formatted Name

[A] ▼

No data available

Refund Recipient

Page 1 of 1 25 records per page ▼

BSB Code *

Account Number *

Account Title *

Required Required Required

Summary Form Parts

Did you know?

- There are standard default summary forms
- You Can
 - Customise summary forms
 - Customise summary form parts
 - Customise summary form columns

Summary Form Parts

Summary Form Part Column Maintenance

Homepage / Summary Form Maintenance / Summary Form Definition Maintenance / Summary Form Part Maintenance / Summary Form Part Column Maintenance

Description: Application Summary
Label Text:
Filter: (any)
My Role: (any)
Part Description: Application Task

Summary Form Part Column (5 results)

1 Selected

	Description [A]	Entity [A]	Field [A]	Label Text [A]	Active
☒	DSCRESP - Responsibility	LAPV6909_TASKS	DSCRESP		☒
☐	DSCCWFTSKT - Task	LAPV6909_TASKS	DSCCWFTSKT		☒
☐	ACTSTART - Started	LAPV6909_TASKS	ACTSTART		☒
☐	ACTCOMP - Completed	LAPV6909_TASKS	ACTCOMP		☒
☐	ESTCOMP - Due	LAPV6909_TASKS	ESTCOMP		☒

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Arrange columns and action buttons by highlighting and using the Up/Down Buttons

Summary Form Part Action Maintenance

Homepage / Summary Form Maintenance / Summary Form Definition Maintenance / Summary Form Part Maintenance / Summary Form Part Action Maintenance

Description: Application Summary
Label Text:
Filter: (any)
My Role: (any)
Part Description: Application Task

Summary Form Part Action (13 results)

13 Selected

	Description [A]	Action Name [A]	Label Text [A]	Active
☒	LAPV6909_TASKS.TASK - Details	CWFG1000		☐
☒	LAPV6909_TASKS.STARTTASK - Start Task	WorkflowController.StartTask		☒
☒	LAPV6909_TASKS.CONTINUETASK - Continue Task	WorkflowController.ContinueTask		☒
☒	LAPV6909_TASKS.COMPLETETASK - Complete Task	WorkflowController.CompleteTask		☒
☒	LAPV6909_TASKS.TASKS - Workflow	CWFG1020		☒
☒	LAPV6909_TASKS.INSERTTASK - Insert Task	WorkflowController.InsertTask		☒
☒	LAPV6909_TASKS.INSERTPROCEDURE - Insert Procedure	WorkflowController.InsertProcedure		☒
☒	LAPV6909_TASKS.REPEATTASK - Repeat Task	WorkflowController.RepeatTask		☒
☒	LAPV6909_TASKS.TIMESHEETS - Timesheets	CWFG1000/Timesheets		☒
☒	LAPV6909_TASKS.DELETETASK - Delete Task	WorkflowController.DeleteTask		☒
☒	LAPV6909_TASKS.TASKS.EMPTY - Workflow	CWFG1020		☒
☒	LAPV6909_TASKS.INSERTTASK.EMPTY - Insert Task	WorkflowController.InsertTask		☒
☒	LAPV6909_TASKS.INSERTPROCEDURE.EMPTY - Insert Procedure	WorkflowController.InsertProcedure		☒

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25 records per page

Analyse Results

2025.03

5-RES

New Dwelling

13 Goodwood Road, WAYVILLE SA 5034

13/10/2012 Processing

4-RES

New Dwelling

3 High Street, INFORTOWN NSW 2232

7/10/2012 In Progress

3-RES

New Dwelling

4 High Street, INFORTOWN NSW 2232

7/10/2012 Processing

2-RES

New Dwelling

5 High Street, INFORTOWN NSW 2232

7/10/2012 Processing

1-RES

New Building

4 High Street, INFORTOWN NSW 2232

7/10/2012 In Progress

☐ 17-RES RES Workflow Ac

☐ 16-RES RES test

☐ 15-RES RES Test Applica

☐ 14-RES RES New dwellir

☐ 13-RES RES new dwellin

☐ 12-RES RES New dwellir

☐ 11-RES RES New dwellir

☐ 10-RES RES New dwellir

☐ 9-RES RES daifda

☐ 8-RES RES adfa

☐ 7-RES RES dafd

☐ 6-RES RES New dwellir

☐ 5-RES RES New dwellir

☐ 4-RES RES New shed

☐ 3-RES RES New dwellir

☐ 2-RES RES test

☐ 1-RES RES test

☐ 249-RES RES New dwellir

☐ 248-RES RES New dwellir

☐ 247-RES RES New dwellir

☐ 246-RES RES New dwellir

☐ 245-RES RES New single s

Q

Analyse Results

Updates results list without having to navigate back to the search profile form

• Changes to Analyse Results

- Using the Search profile form, add relevant criteria and search
- Make an amendment to a record, and save
- Using the magnifying glass at the bottom of search results, this will update the search and drop the record from the list. (NB: The change will need to occur as part of the search criteria e.g. If you search for a status of Approved and you change it to Completed, then it will drop from the list).

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Working with Conditions

Application

Application

17-RES, 12 Greenhill Road, WAYVILLE SA 5034

Conditions (0 results)

☐

Condition Type

Description

Non standard

Notifiable



No data available

Page 1 of 1

25 records per page

1. Add >> click search
2. Analyse Results
3. Select All

Analyse Results

Update Results List

Analyse Results (16 results)

3.

16 Selected

Remove

Application	Role Number	Condition Type	Description	Condition Group	Description	Document Path
LAP	1	ARCDRAW	Architectural Drawings	RFI	RFI Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00000000\00010527.doc
LAP	1	BSM	Boundary 5m	DECN	Planning Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00000000\00007467.doc
LAP	1	BPEG	Boundary Peg Location	DECN	Planning Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00000000\00007470.doc
LAP	1	CHECK	Processing Check Sheet			E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00000000\00010543.doc
LAP	1	CLADDING	Cladding	RFI	RFI Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00000000\00010528.doc
LAP	1	FFL	Finished Floor Levels	DECN	Planning Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00000000\00007468.doc
LAP	1	FOU	Foundations	DECN	Planning Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00000000\00007469.doc
LAP	1	INSPONH	Inspections on Hold			E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00000000\00010542.doc
LAP	1	IRDEV	IR - Development Engineering	IR	Internal Referral	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00000000\00013432.doc
LAP	1	OTHER	Further Information	RFI	RFI Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00000000\00010529.doc
LAP	1	P1	Plumbing Inspections	DECN	Planning Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00000000\00014586.docx
LAP	1	S1	S - Site Plan	DECN	Planning Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00000000\00014582.docx
LAP	1	S2	S - Amenity and Aesthetics	DECN	Planning Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00000000\00014583.docx
LAP	1	S3	S - Energy Efficiency	DECN	Planning Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00000000\00014584.docx
LAP	1	S4	S - Inspections	DECN	Planning Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00000000\00014585.docx
LAP	1	SC	Site Coverage	DECN	Planning Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00000000\00007466.doc

Page 1 of 1

25 records per page

16 Results

ARCDRAW

☐ Architectural Drawings

RFI

BSM

☐ Boundary 5m

DECN

BPEG

☐ Boundary Peg Location

DECN

CHECK

☐ Processing Check Sheet

CLADDING

☐ Cladding

RFI

FFL

☐ Finished Floor Levels

DECN

FOU

☐ Foundations

DECN

INSPONH

☐ Inspections on Hold

IRDEV

☐ IR - Development Engineering

IR

OTHER

☐ Further Information

RFI

P1

☐ Plumbing Inspections

DECN

Select All

Analyse Results

2.

Working with Conditions cont.

← Analyse Results

6. Update Results List

Analyse Results (6 of 16 results)

11 Selected

5. Remove

	Application	Role Number	Condition Type	Description	Condition Group	Description	Document Path	
4.	☒	LAP	1	INSPONH	Inspections on Hold		E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00010000\00010542.doc	
	☐	LAP	1	S1	S - Site Plan	DECN	Planning Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00010000\00014582.docx
	☐	LAP	1	S2	S - Amenity and Aesthetics	DECN	Planning Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00010000\00014583.docx
	☐	LAP	1	S3	S - Energy Efficiency	DECN	Planning Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00010000\00014584.docx
	☐	LAP	1	S4	S - Inspections	DECN	Planning Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00010000\00014585.docx
	☐	LAP	1	SC	Site Coverage	DECN	Planning Conditions	E:\Program Files\Infor\PathDocs\Demo\LAP\FINAL\00000000\00007466.doc

Page 1 of 1 25 records per page

Make a selection

← 5 Results

S1

☒ S - Site Plan

DECN

S2

☒ S - Amenity and Aesthetics

DECN

S3

☒ S - Energy Efficiency

DECN

S4

☒ S - Inspections

DECN

SC

☒ Site Coverage

DECN

7. Select All

Analyse Results

Working with Conditions cont.

Make a selection

← 5 Results

S1

☒ S - Site Plan
DECN

S2

☒ S - Amenity and Aesthetics
DECN

S3

☒ S - Energy Efficiency
DECN

S4

☒ S - Inspections
DECN

SC

☒ Site Coverage
DECN

← Condition Type Selection

Condition Type

S1

Description

S - Site Plan

Condition Group

DECN

Description

Planning Conditions

8. Select

9. Conditions are added

← Application Conditions Maintenance

Save Undo

Planning Permits Summary / Application Conditions Maintenance

Application

Application

17-RES, 12 Greenhill Road, WAYVILLE SA 5034

Conditions (5 results)

Resequence Add Edit Document View Document

☐	Condition Type	Description	Non Standard	Notifiable
☐	S2	S - Amenity and Aesthetics	☐	☐
☐	S3	S - Energy Efficiency	☐	☐
☐	S4	S - Inspections	☐	☐
☐	SC	Site Coverage	☐	☐
☐	S1	S - Site Plan	☐	☐

Page 1 of 1

25 records per page

Advanced Workflow Editor

- **Visual Flow Chart Design:** Build and manage workflows through an intuitive, interactive flow chart interface
- **Auto-start options:** Configure workflow to trigger automatically
- **Switch Views:** Seamlessly toggle between the classic editor and advanced editor to suit user preference
- **Copy and adapt:** Duplicate existing procedures, give them a new name and make amendments – eliminating the need to re-create similar workflows from scratch

