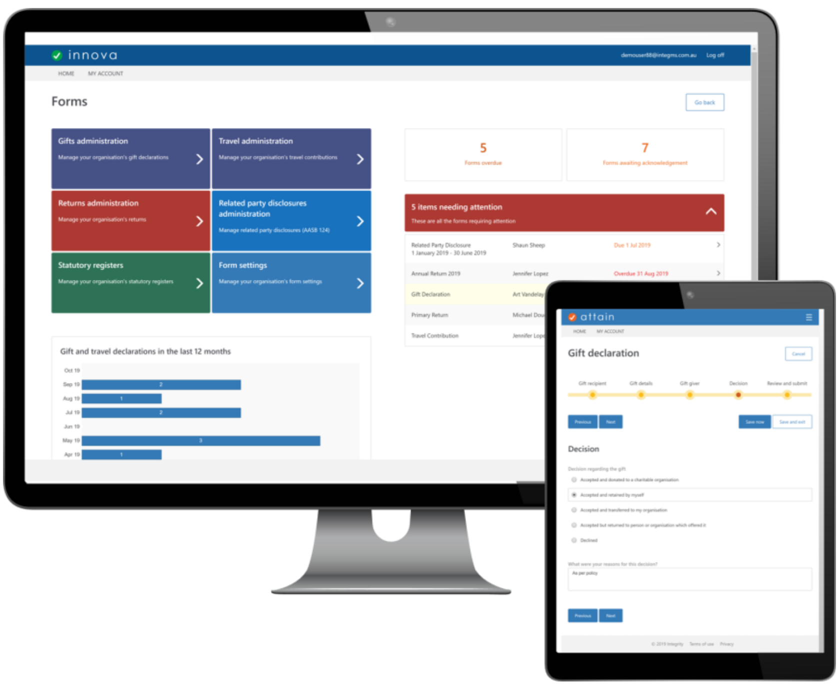
Administrator’s Operation Manual

Attain Compliance Software



Version 1.0

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1. Introduction

Attain is for local governments who wish to meet high standards of compliance within resource and cost restrictions, it provides seamless and efficient management of disclosure of gifts, travel, returns, delegations, related party disclosures (AASB124) and a Compliance Calendar.

Attain does this by completely replacing inefficient paper-based systems with:

- Online access to all forms, anytime from mobile devices
- Electronic acknowledgments, receipts and reminders
- Full monitoring and reporting facility for better governance oversight
- Easily generated Compliance Registers for posting online
- Complete management, reporting and monitoring of compliance activities
- Full audit ready reporting

This guide will take you through the initial set up process and provide you with important information. We recommend you follow the set-up process in order of steps 1 to 5 below.

The following sections are covered in this guide:

1. Setting up your organisation
2. Setting up Users
3. Assign Claims & Licences
4. Assign Roles & Positions
5. Send registration link to user

Don't forget to check out the useful information in the Help sections in Attain.

IMPORTANT: If you have any questions or need assistance, please use the Support Centre to send a Request. We monitor this constantly and will respond quickly.

2. Setting up your organisation

This section will take you through the various steps you will need to ensure you have entered all the data Attain requires about your organisation.

2.1 Entering Form Recipients

Form recipients are the recipients of submitted forms or approvers for forms requiring approval. The details you enter here are to identify the person or section that you will later allocate as the receiver of form(s). You can enter multiple form recipients if this is required (i.e. Mayor and CEO). Entries in this list can be added, changed or deleted without affecting any previously submitted forms.

1. From the Home Page select the Forms Icon
2. Select the Form Recipient icon and click *Add New Form Recipient* Tab.
3. Enter the Form Recipient's Name, Position and email address.
4. Next enter a short description of the Form Recipient's Purpose (e.g. who they are, what they will approve, etc)

2.2 Creating a User Support Contact

The user support contact represents your organisation's single point of contact for all users. These contact details will become the central contact for all system users on matters such as compliance questions or how to use the system.

1. From the Home Page, go to the *Organisation* icon
2. Select the *Administration Support* tab
3. Select *Edit*
4. Enter your support contact Name, Business Phone and Email Address
    a. It is recommended to use generic organisation contact details (e.g., governance@example.com) rather than an individual contact as generic details will rarely change.
5. Select the option to *Receive automated email reminders* by choosing *On*
6. When this option is switched on the administration support contact will receive automated email reminders for items that are due. The timing and frequency of these email reminders can be configured.

IMPORTANT: Any help or support request from a user (using the *Get Help* option in Attain) will only be sent to your organisation's user support contact to be dealt with by your organisation. However, all support requests from Administrators using the *Support Request* will be sent directly to Integrity Support. Therefore, you will need to forward those user support requests that Integrity Support needs to deal with.

2.3 Creating Organisational Roles and Positions

Organisational roles and positions reflect all those designated/delegated positions that your organisation has appointed, as well as any positions you wish to be captured in the Compliance Calendar.

You should also note that you can enter one position with multiple occupants, no need to enter separate positions for each person occupying the position. An important exception to this is where a position has multiple occupants with each occupant having different delegated functions. If this is the case, you will need to enter a unique position for each different delegation. For example, *Ranger Parking, Ranger Parks and Wildlife, Ranger Dog Control* etc

1. From the Home Screen, Select the *Positions and Roles* Icon
2. Select the *Add New Position* Tab.
3. Add a title of an *Organisational Position*
    a. This can be a specific title such as Mayor or CEO or a generic title such as Councillor, Ranger or Planning Officer.
    b. IMPORTANT: Each position title that is entered must be unique

4. Assign an Organisational Role
    a. An organisation role determines the types of forms that are applicable to a given position or role. For example, a position that is defined with an organisation role as a designated officer will be required to complete annual returns, whereas an employee or non-designated officer, is not.
5. You have the option to assign a *Form Recipient*, **however** we recommend you leave this blank as default form recipient settings are managed under Form Settings which are preferable to assigning a form recipient to each individual position.
6. Tick the box if any person who is assigned this position is a Key Management Personnel (KMP). They will then be required to submit a *Related Party Disclosure Form*. If they are not, do not tick this box.
7. Click Save.
8. You will automatically be taken to a screen that shows a summary of the Position, including Users assigned to the Position.
9. Click the back arrow and repeat steps for each position you wish to enter.

2.4 Option for employees to sign in with SSO without an existing Attain account

If your Organisation utilises Microsoft Single Sign On (SSO), you can provide users with the option to sign into Attain without having to register. If they sign in using SSO and do not already have an account set up in Attain, an account will automatically be created for them. They will then be able to immediately access the *Gift Declaration* Module.

The purpose of this feature is to provide Attain access for any employee to disclose a gift without the need to set up Attain with the details of all employees, including those who may rarely receive a gift.

3. Setting up users

You are now ready to set up the users that you will be granting access to use Attain.

3.1 Create a user

1. From the Home Screen, Select the *Users*' Icon
2. From the Users Screen, select the *Create New User* tab
3. Next, enter the new User's first and last name.
4. Add the new User's contact email address
    a. It is important to ensure each User email address is correct and unique as Attain will use this as their sign in username and to send a secure link to allow them to register on the system.

Note: When you are entering a user email address you will also need to enter the UPN. A User Principal Name (UPN) is a unique digital identifier used by Microsoft to sign in via Azure Active Directory. Generally speaking, the UPN is usually the same as the email address, but this can vary depending on your organisation's Azure Active Directory configuration. If you need to find out more about your UPN, talk to your IT team.

5. Select Create.
6. After you have created a new User you will be automatically taken to a screen where you can manage preferences for that User.

4. Assigning claims

Only Administrators need to be assigned a 'Claim'. Users who are not Administrators (and will only be logging into Attain) do not need to be assigned any claim.

4.1 Assigning claims to an Administrator

1. Select the Claims tab
2. Select Manage Claims
3. Select the Claims for this user. If this is an Administrator that needs access to all aspects of Attain Administration, select *Attain Administration – Administrator (can access everything)*
4. Select Save. The Administrator will now have access to Attain Administration.

5. Assigning a position or role

After setting up a new user or Administrator you next need to assign them to a position and role.

1. After creating a new user, select the Positions and Roles tab.
2. Select Assign Position or Role.
3. Then select the User's Position from the Positions drop down menu (you entered these positions earlier, see section 2.3 on Creating Organisational Roles and Positions).
4. Enter the date the User was appointed to this position or the date they became a designated employee

Important: Attain will only identify a Primary Return is required if the User has a Start Date within the last 3 months. This is because a Start Date more than 3 months ago would mean a Primary Return would already be overdue.

5. Enter their end date if you know when they will leave position, such as when acting in a position (leave blank if not known).
6. If this is a temporary Acting role also tick the box *Acting Assignment*.
7. Select Save
    a. it is possible to assign a user to two or more positions concurrently. This works well in situations where a user is acting in one position temporarily whilst also remaining in their substantive position.

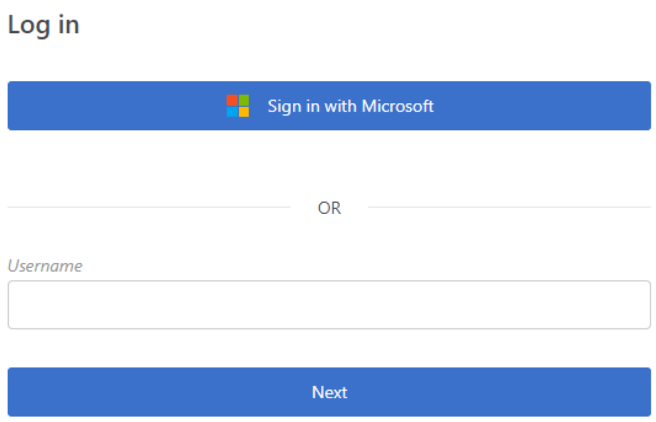
8. If you wish to enter another position for this User, repeat the above steps.

6. Registration using Microsoft Single Sign On

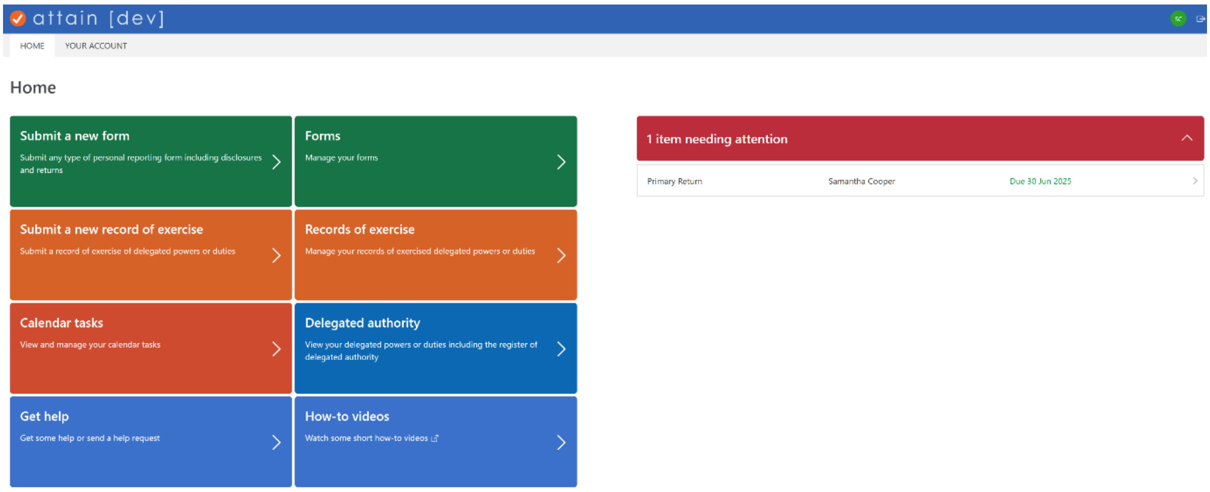
There are a number of ways to sign in to Attain but by far the simplest and easiest to use is Microsoft Single Sign-On (SSO).

SSO is an authentication method that allows users to access multiple applications with a single set of credentials. This means you only need to login once to access all your apps, whether they are cloud-based, on-premises, or software as a service (SaaS) applications. If a user will be signing in with SSO, you do not need to send them a registration link through Attain.

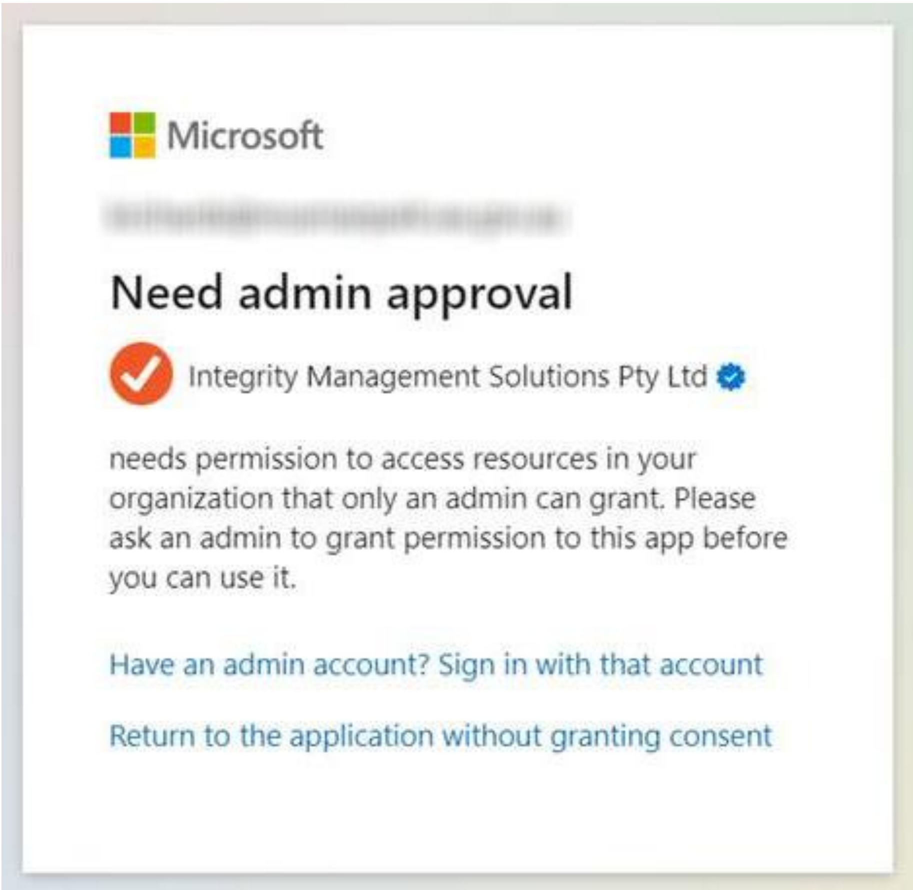
1. To allow Users to commence using Attain with SSO, you only need to provide Users with the link to the Attain Login page. The User can select the link https://app.attain.au/ and be taken to the Login page to begin the sign in process (Instruction Manuals for Elected Member and Employees are available to explain this process to Users).



2. To begin, Users need to select *'Sign in with Microsoft'*. Users should **NOT** fill in their Username.
3. A message may appear asking the User to enter their organisation's (Microsoft) sign in details if this is the first time they've used SSO, otherwise they will be taken straight to the Attain Home screen



If you receive a security message similar to the image below, this means your IT Section will need to grant permission for Attain to be granted access to SSO.



7. Sending a registration link to a user

If for some reason you cannot use SSO, there is an alternative method to securely register Users in Attain.

1. From the Home screen select Users
2. From the list of names of Users, select the person you wish to register.
3. Select the Registration tab.
4. Select Send or Resend Registration Link
5. Enter the User's email address.
6. Select the Application the User needs to register for
    a. *Attain* is for Users, *Attain Administration* is only for Administrators

7. Select *Send Registration Link*. NOTE: a Registration link is only valid for 24 hours.
8. The User will shortly receive an email with a secure registration link.
9. After selecting the link, the User will be taken to the sign in page. Here the User will be required to choose a password. Once this is done, they can securely sign into the system at any time with their Username (their email address) and the password they have chosen.
10. If at any time the User forgets their password, they can select *Forgot Your Password* at the log in screen and, after entering their email address, a secure link will be sent to them, allowing them to reset their password.

8. Setting up and managing delegations in attain

Attain will allow you to manage all aspects of your organisation's delegations. This includes:

- Keeping track of all organisational positions with delegated authority.
- Printing individual Instruments of Delegation.
- Print an up-to-date Delegations Register at any time.
- Edit, amend and remove delegations simply and easily.
- Track changes and keep records of amended delegations

1. From the Home Page, Select the Delegations icon
2. Before you can begin to enter your Delegations, you will need to enter the categories that your various delegations are sorted under. For example, delegations may be categorised as relating to Health or Planning etc. These headings will be used to compile the various delegations in category order when the delegations register is printed.
3. To enter categories, select the *Delegations Categories* icon, and then *Add New Category*.
4. Enter the Category name and then select Save.
5. You can view a list of the Categories entered under the Categories tab in the Categories icon
6. We also recommend entering the *Heads of Power* and *Delegation Types* before beginning entering the Delegations themselves.
7. Select the *Heads of Power* icon
    a. Delegation heads of power represent the legislation or authorisation of delegations of authority. Adding a head of power to a delegation is not mandatory, but it is recommended and can be useful for categorising the delegations as they appear in the register.

8. Select *Add new Head of Power*, enter a title and a description and select Save.
9. Next select the *Delegation Types* icon
    a. A delegation type is an optional feature for grouping delegations for reports as well as how delegations will appear in the register. A type can be defined as anything that assists in classifying or grouping delegations. For example, you may wish to group delegations by legislation or by business unit.

10. Repeat the same steps as above by entering a Delegation Type.

9. Entering Delegation details

1. To begin entering Delegations, Select the *Manage Delegations* icon and click on the *Create new delegation* tab.
    a. Be sure to monitor the *Help* sections on each page as you fill out the detail of the delegation. These sections provide further information and guidance on what to include in each section.

2. Enter a Reference for the Delegation.
    a. The value you enter in the Reference field will be used to uniquely identify and sort each delegation in ascending order in the printed Delegations Register. You can use letters and numbers in this field but be aware of how this will affect sorting.

3. Next enter the subject of the delegation (for example, Recovery of Costs Bush Fires Act). Select Next.
4. Optional: Next select the Head of Power, Category and Delegation Type.
5. Next, Select the Delegator
    a. This is the position or administrative body with the original power and authority to delegate the exercise of its powers or the discharge of its duties, e.g. Council.
6. Now enter the Express Power to Delegate
    a. The express power to delegate describes the authority or legislation allowing for the delegation of the exercise of the entity's powers or the discharge of its duties.

7. Now you need to enter the Express Power or Duty Delegated
    a. The express power or duty delegated lists the legislation and relevant sections describing the power or duty that is being delegated.
    b. Next enter a full description of the function of the power or duty that is being delegated.

8. Add the Delegates by clicking Add, then tick the boxes next to the positions from the list that apply
    a. Select the positions or administrative bodies to whom the power or duty has been delegated to. If a mistake is made, you can easily remove and add the correct delegate.

9. Next, add any conditions that may apply
    a. Add any conditions that might affect the usage of the power or duty. If there are no conditions, leave this section blank.

10. If relevant, enter the Express Power to Subdelegate
    a. The express power to subdelegate describes the authority or legislation allowing for the subdelegation of the exercise of its powers or the discharge of its duties. If the power or duty is not being subdelegated, leave this section blank.

11. If relevant, you will now add any Subdelegates.

   a. Select the positions or administrative bodies to whom the power or duty has been subdelegated to. If there are no subdelegates, ignore this section. If a mistake is made, you can easily remove and add the correct subdelegate.

12. Fill in any Subdelegate Conditions that apply
    a. Add any conditions that might imposed by the delegate in respect of the usage of the power or duty. If there are no subdelegate conditions, leave this section blank.

13. If relevant, enter the statutory framework that underlines the function and the delegation of the power or duty. This can include relevant legislation that indirectly supports the function and the delegation of the power or duty. If no statutory framework exists, leave this section blank.

14. Enter any policies that might relate to the function and the delegation of the power or duty. If there are no policies, leave this section blank.
15. Enter any record keeping references that might relate to the function and the delegation of the power or duty. If there are no record keeping references, leave this section blank.
16. Now Enter any amendments to this delegated power or duty. View the onscreen Help for more information regarding amendments
    a. Enter the Adoption Date, followed by the Type of amendment from the drop-down menu. See the onscreen Help for descriptions of the types of amendments.
    b. Next enter an Amendment Description
    c. Finally enter any relevant References (optional). Click Save

17. This will bring you to the final Preview page before Publishing. If the Delegation is correct, select *Prepare for Publishing*.
    a. Once the draft delegation meets the minimum requirements in terms of the completion of the required sections the *Prepare for Publishing* button will be available. Here, you can review the new or amended delegation (draft) to determine if it is ready for publishing.
    b. Alternatively, you can leave the new delegation unpublished (will only appear in the Draft Register) until you return to it later. Just click *Save and Exit*
    c. Note: You can use this feature to create a draft Delegation Register which you can check for errors or to confirm details prior to uploading the Published Register.

18. Once you select *Prepare for Publishing* you are taken to a page that allows you to *Print the Delegation, Edit the Draft, Discard the Draft*, *Review* and *modify review dates*, *view the versions* and *history*, view which users have the delegated authority, and finally, publish it to the register.
19. Once you select publish, you have the option to update the *Adoption Date* and *References*, and add an *Amendment*. Select either Yes or No. You also have the option to send an email notification to of this delegation to all delegates and subdelegates. This is particularly useful if there has been a change made to the delegation in order to make them aware. Now Select *Publish to the Register*.

10. Removing a delegation from the Register

1. From the Home Screen, select the *Delegations* Icon
2. Next select *Manage Delegations*
3. From the list of Delegations, select the Delegation(s) you wish to remove from the register
4. Removing a repealed delegation from the register is a two-step process that requires you to first mark the delegation for removal, then removing it as an adopted or approved amendment to the register. First select *Mark for Removal*, then, confirm your decision by selecting *Mark for Removal* again at the top of the page.
    a. This simply tags the delegation and highlights it as *MARKED FOR REMOVAL* in the draft version of the register
    b. If you have marked a delegation for removal by mistake, this can easily be reversed by unmarking it for removal.
5. Once approval is granted to remove the repealed delegation from the register, you can select *Remove from the register* and if necessary, add an amendment to reflect the change to the register.
6. Finally, to finalise the changes, select *Publish to the Register*. This is the final step to ensure all changes are reflected on the register itself.
7. You can restore the Delegation to the register at any time simply by searching for the Delegation under *Manage Delegation*, selecting it, and then choosing *Restore to the Register*, then *Publish to the Register*.

11. Editing a delegation or adding an amendment

1. From Home, select *Delegations*
2. Select the *Manage Delegations* Module
3. Select the Delegation you wish to Edit or add an Amendment to
4. Select *Create New Draft* on the right-hand side of the screen
5. If you wish to Edit the Delegation, keep clicking Next until you get to the section you wish to Edit.
6. Alternatively, if adding an amendment, keep selecting *Next* until you get to the Amendments section.
7. Select Add to add the new Amendment. Enter the required information, followed by Add.
8. Continue through the Delegation until you get to the Preview Screen NOTE: if you wish to highlight the changes that have been made, select the tab Tracked Changes and tick the boxes. You will the be able to clearly identify the changes between the Draft and Published versions of the delegation.
9. Select *Prepare for Publishing*
10. Check the details are correct and select *Publish to the Register*.
11. Enter the date the Delegation was adopted, etc and press *Publish to the Register*.
12. This will replace the previous version of the Delegation. You can view all versions at any time under the tab Versions.

12. Sending Advice Notifications

You have the option to send out a group email notification for each delegation at any time.

1. Select the relevant delegation
2. Select the tab Assignments and advice notifications
3. Here you can view who has the delegation
4. Now select the tab *Send a Group Notification*
5. Select *Create Group Notification Email*
6. Scroll down and select any and all delegates/subdelegates that you wish to send them email notification to.
7. Select Send
8. You can view a comprehensive history of all notifications sent out by selecting the Notification History tab.

13. Printing the Delegations Register

Attain will allow you to easily generate your Delegations Register at any time ready for printing. If you use the export feature, you can convert the Attain generated report into an PDF file ready for uploading to your website or export to Microsoft Word, ready for any design features you may wish to add.

1. From the Home Page, select the Delegation icon.
2. Select Register of Delegated Authority
3. This will bring you to a page from which you can fully customise and organise your register to suit the needs of your Organisation.
4. View the On-screen help for further information about how to customise your register
    a. Note, to have to Organisation's Logo appear on the register simply select the Cover Page tab, select Edit and ensure the *Show Cover Page Logo* box is ticked.
5. You can save multiple versions of your Delegations Register (e.g. a version for Council to CEO delegations and a version for CEO to Council – let us know if you would like help doing this).
    a. Once you are happy with the way you have set up the Register, select Save. You can save as many versions as you wish.

14. Adding review dates

It is possible to add Review dates for your Delegations Register that will apply to all individual delegations. Once entered, these review dates will automatically flow through to each individual delegation to make it easy to manage the review dates for all delegations. However, it is possible to override these dates for a given delegation by setting the review dates in the delegation itself.

1. From Home, select Delegations
2. Now select Review Dates
3. Select Edit and enter in the Last Reviewed Date (optional) followed by the Next Reviewed Date. If the next review date has been set here, this will send reminders for all the delegations where the delegation does not have its own next review date set.
4. Select Save.

Important Tip: if you wish to override these review dates for a given delegation(s), go to Manage Delegations, select the delegation(s) in question, select the Review tab and select Modify. Here you can enter review dates that will only apply to this delegation overriding the dates entered for the whole register

Records of exercise of delegated authority

15. Managing records of exercise

In Attain, Officers with delegated powers or duties have the option to manage all records that relate to the exercise of any delegation that is assigned to them. Users will see a table showing all Active and Submitted records that relate to themselves. That is, they can only see those records that they created or submitted. In this way a User, without delegated authority, can monitor records they have submitted for checking, and see those that have been returned for further attention.

As an Administrator using Attain Administration, you will have the added facility to see and print all submitted records from any User or Officer in a delegated position.

1. From the Home Page, Select the Delegations icon
2. Then Select Manage Records of Exercise
3. This will take you to a table that will show you all *Active records (*those awaiting submission*)*, and those that have been *Submitted*.
4. Under the Awaiting Submission tab, you can select a Delegation, which will take you to a screen with a summary of the record of exercise. From here you can Delete the Record or Send a Reminder for Review and Submission. From here you can also view a full Form history and see the User that the form is currently with.
5. Under the Submitted tab, if you select a Delegation you will be taken to a screen with a summary of the record, from which you Delete the Record, or Download a Printable Record. You can also view a full Form History.
6. Within this module, you are given the option to generate a printable register.
    a. This allows you to create a summarised printable register of all submitted records of exercise of delegated powers or duties.
    b. You can fully customise this report by parameters such as date of decision or date submitted, a specific date range, by category of delegation, where the delegation of authority is, etc

7. Customise the Printable Report to suit your requirements, and then select Preview Results.
8. This will show you all the Records that will appear on your report before you generate it. You can change the parameters by selecting Go Back to the Report or Register Configuration.
9. Once you are happy with it, select Generate Printable Report or Register and it will generate a pdf report.

16. Managing and monitoring returns

This is an important feature that allows you to identify who is required to submit a Primary or Annual Return and when it is due. Importantly, for this feature to function correctly you will need to ensure the commencement date (and end date if applicable or leave blank) has been entered in Attain Administration for users occupying designated positions. Attain will use this information to calculate their period in the position and suggest whether they need to complete a Return. Note: Attain will tend to over report and cannot take into account Returns submitted outside its system. You can manage situations like this by using the unmonitoring function (see Monitored Returns).

Monitored Returns

1. From the Home Screen, Select the *Forms* icon
2. Select *Returns Administration*
3. Firstly, you must configure the settings for *Monitored Returns*
    a. See the Help tab for further information about *Monitored Forms*
4. Select the *Monitored Returns Configuration* tab
5. Select *Configure Monitored Returns*
6. Select the *Return periods to Monitor* (ensure you have selected Primary Returns as well as the relevant Annual Return periods)
7. Select the *Returns* tab
8. From here, the Administrator can see a table of all Returns that Attain is suggesting that are due for submission.

Unmonitored Returns

1. Returns that the Administrator wishes to remove from the Monitored list can be Unmonitored. To unmonitor a form, select it from the list and select the button 'Stop Monitoring Now'. Unmonitored forms can be viewed under Users > select the user's name > Forms > Unmonitored.

Submitted Returns

1. Select the *Submitted Forms* tab
2. From here the Administrator can see a table of all Returns that have been submitted. Dates can be customised under the *Custom Date Range* tab.

Printable Reports

1. To generate Return Reports, select the *Printable Reports* tab.
2. From here, you can create a summarised printable report of all Returns.
3. See onscreen Help for further details

Returns Register

1. The Returns register will generate a printed record of each submitted annual and primary return, including acknowledgment receipts and any associated notes.

Statutory Registers

1. Under Forms > Statutory Registers select the tab Annual and Primary Returns and you will be able to generate a report of lodged Primary and Annual Returns for posting on your website.
2. If a user has left the organisation and you wish to remove their forms from this register, select the Excluded Users tab and add their name.

17. Managing and reporting on related party transactions

The Related Party Administration module is designed to assist you in meeting the requirements of AASB 124 for collecting information about relatives, businesses and other entities connected with those members of your organisation who occupy positions that have the authority and responsibility, directly or indirectly, for planning, directing and controlling the activities of your organisation.

Members who occupy these positions are considered Key Management Personnel (KMP). This module is designed to allow your organisation to easily collect information from your KMP's concerning details of their related entities, close family members and related entities of close family members. You may also collect any relevant information from your KMP's concerning related party transactions

Setting disclosure period

1. From Home screen, select Forms and then the Related Party Disclosures Administration Module.
2. The first task that needs to be completed is the setting up of the new email address that will receive forms from KMP (key management personnel). This will be your organisation's form recipient for Related Party Transaction Disclosures.
3. Select the Settings tab and under Related party disclosure recipient, select the form recipient you wish to receive these forms. **Note: the form recipient must be first entered under Forms > Form Recipients.** Please note information received from KMP's should be treated as private.
4. Next set the disclosure periods. Select Customise the Disclosure Periods, or if you wish to have the default dates, skip this step (the default dates are the financial years).
5. You have the option to update the number of months to submit the form at the end of the disclosure period. For example, if the disclosure period ends on 30 June, a value of 1 month means that the form will be due by 31 July. This is completely optional.

Setting up KMP's

1. Select the KMP tab
2. Select or deselect the positions or roles in this list to define those positions or roles held by key management personnel.

Configure monitored disclosures

1. Select the Monitored Disclosures Configuration tab

2. Select the Configure Monitored Disclosures button
3. Tick the box for the disclosure period you wish to monitor
    a. Under the Settings tab you can add additional Disclosure Periods

Submitted Related Party Disclosures

1. Select the Submitted Forms tab
2. From here the Administrator can see a table of all Disclosures that have been submitted over the last 12 months. However, dates can be customised under the Custom Date Range tab.
3. If you wish to access a submitted RPD form, select the relevant name from the list, and select Download Printable Form. You can also elect to Resend the form, and it will be resent to the relevant form recipient.

Printable reports

1. To generate a Printable Report of submitted Disclosures, select the Printable Reports tab.
2. From here, you can create a summarised printable report of all disclosures.
   See onscreen Help for further details.

Export submitted data

Your organisation's finance officers may find it useful to export data relating to related parties and transactions into a common file format (i.e. CSV or Excel). This exported data can then be used for querying related party transactions or importation to another database or system. See onscreen help for details.

18. Managing and monitoring gift disclosures

The Gift Administration screen contains a table detailing all gift disclosures. From here, you can view all Gifts that are *Awaiting Submission* and those that have been *Submitted*. You can also generate a fully configurable printable report that allows you to view gifts. NOTE: The Form 4 Gift Register is located under the Statutory Forms icon.

1. From the Home screen, select Forms and then Gifts Administration
2. You will be taken to a table displaying all Gifts Awaiting Submission.
    a. This will allow you to see all gifts received across the whole organisation and quickly identify any that have not been acknowledged. By selecting individual entries in the table, you can see specific details of each gift.

3. If you wish to send a reminder about a Gift Disclosure that is awaiting submission, simply select the gift, select either *Send a Reminder to Complete this form* if the User has not finished it, or Send a Reminder to get an acknowledgement receipt, if the approver has not yet done so. An email will be generated to remind the recipient to either receipt the gift or complete the form and submit it. Click send.
4. From this screen you are also able to delete a Gift by clicking *Delete this Form*.
5. Under the *Submitted Forms* tab, you can view all submitted gifts, and by selecting the *Custom Date Range* tab, are able to organise them within certain date parameters.
6. By selecting a specific Gift from the list, you can view all information relating to the Gift, as well as a complete *Form History*, which shows a full audit trail of where the gift has been sent. You are also able *Download* a printable version of the form and/or delete the form completely.
7. Under the tab *Printable Report or Register*, you can create a summarised printable report or register of all submitted gifts.
    a. The *All-Gifts* Register contains all the gifts disclosed by elected members and all employees. This includes those gifts that are not required by the relevant legislation to be reported in either the Employee Gifts Register or the Form 4 Register.
    b. You can use the All Gifts Register to identify every (reported) gift your organisation has received, not just those appearing in the statutory registers.

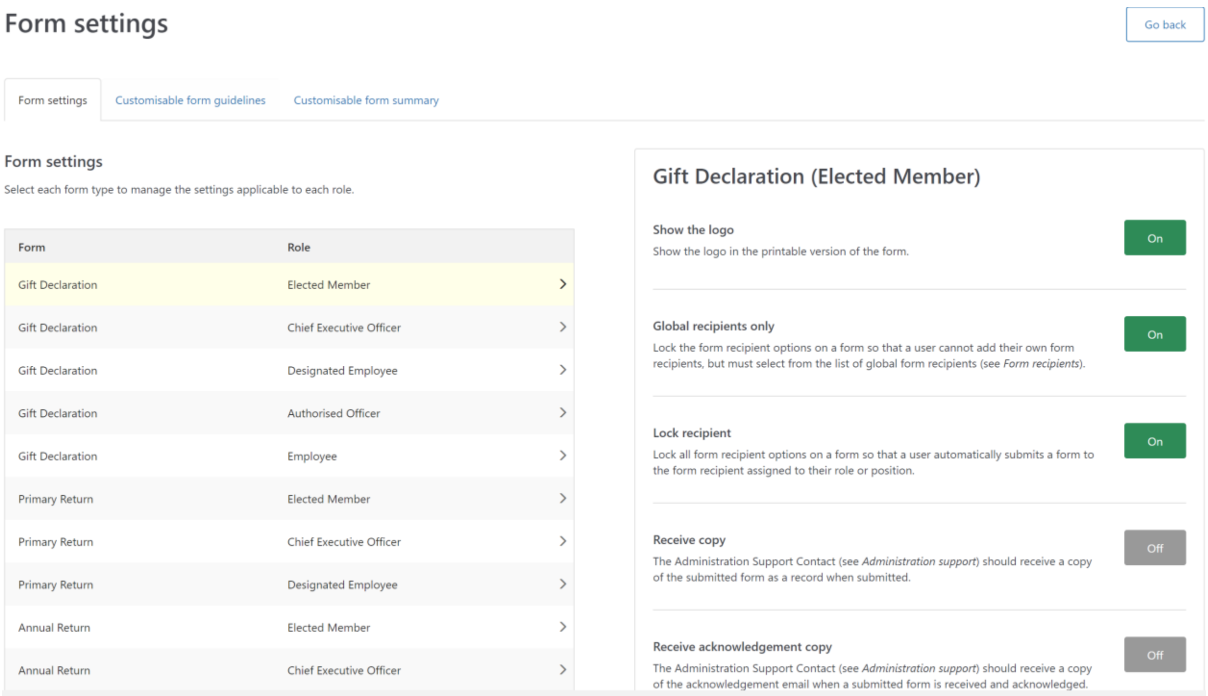
8. Customise the Printable Report to suit your requirements, and then select *Preview Results*.
9. This will show you all the Gifts that will appear on your report before you generate it. You can change the parameters by selecting *Go Back to the Report or Register Configuration*.
10. Once you are happy with it, select *Generate Printable Report or Register* and it will generate a pdf report.

19. Customising form settings (Important!!)

This is where you decide which forms need to be approved, which forms will display the Organisation's logo and much more.

1. From the Home Page, Select the Forms Icon and then the Forms Settings icon.

Choose the settings that you wish to activate for each form type and Role.



Important: It is recommended that you select (switch 'on') the *Global Recipients Only* and *Lock Recipients* options to ensure users will automatically submit their forms to the default form recipients that your organisation has set up (i.e. the option for uses to choose from a list will be disabled).

20. Legacy gifts

If you wish to enter details of a gift that was created outside Attain, i.e. a paper form was submitted, you can manually enter the details of the gift using the Legacy option in Attain. This provides the ability for you to ensure gifts created outside Attain can be entered on the gift register(s) that Attain provides. CAUTION: These legacy gifts are not recognised by Attain for the purposes of identifying cumulative values, type of gifts or automatically entering in the correct register. These gifts must be manually managed, and it is therefore recommended that this option is used with caution.

1. From Home Screen, select Forms and then Gifts Administration.
2. Select the Legacy Gifts Tab.

21. Statutory Registers

This icon allows you to create a printable version of a statutory register ready for posting on your website. For example, Former Form 4, Form 4 (CEO and elected members), Employee Gifts and All Gifts Register.

1. From the Home Page, Select Forms and then Statutory Registers
2. From here you can customise your Organisation's Register by date before generating it into either a PDF, Microsoft Word or Excel document ready for uploading to the Organisation's website.
3. You can also generate an All Gifts Register that is also fully customisable by date.
4. You also have the ability to generate the Primary and Annual Returns Register (as per Reg 29c). Select the tab Primary Annual Returns and choose the options to customise this Register.

22. Support centre

Important: Remember, if you require support at any stage, please use the Support Centre accessible from the Home Page. We're ready to help!

Thank you

We at Integrity would like to express our appreciation for your decision to purchase our product. We assure you of our continued commitment to innovative design and improvements that will allow you and your organisation to meet the highest standard in compliance management.

We will keep you informed as new products come online and we look forward to doing future business with you. Our aim is to make your experience with us enjoyable, professional and cost effective.

Please feel free to contact us at info@integms.com.au if you have any questions or would like information about our other products.