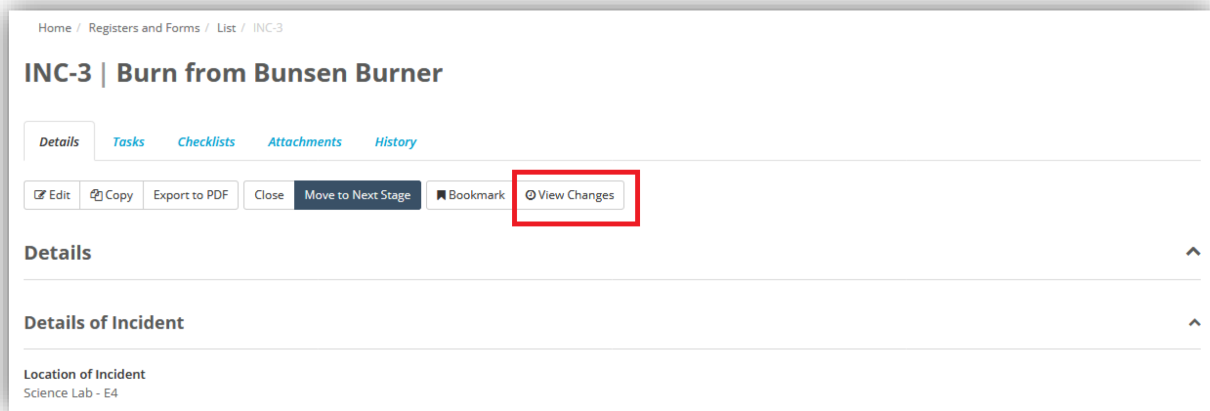
Assurance Release v220 - August 2018

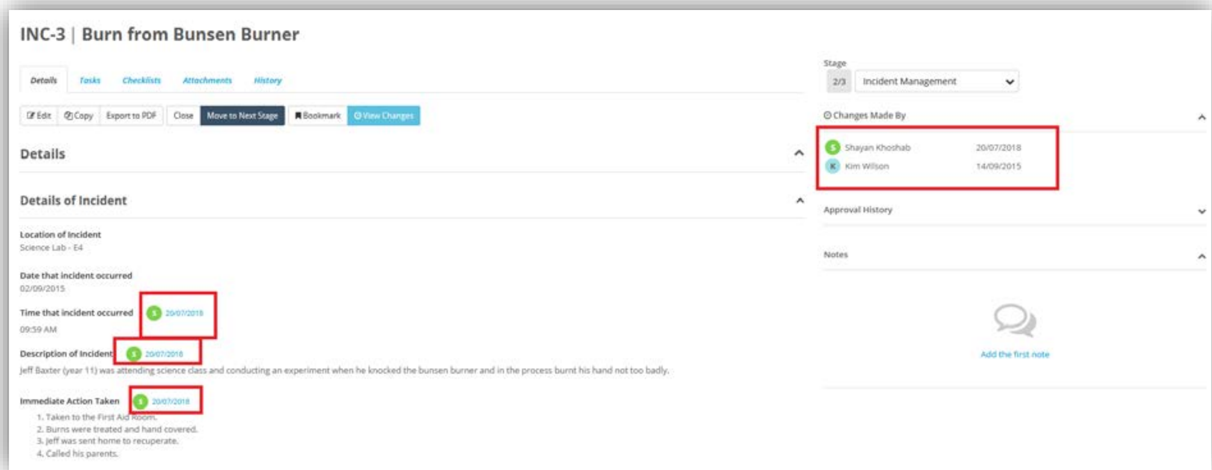
View Changes

View Changes is an audit feature that provides a timeline of changes made to the data in your Registers and Forms entries, and an audit trail of who has made changes.

You can now view all changes through the details tab on each instance of a particular Register and Form by clicking the ‘View Changes’ button shown below.

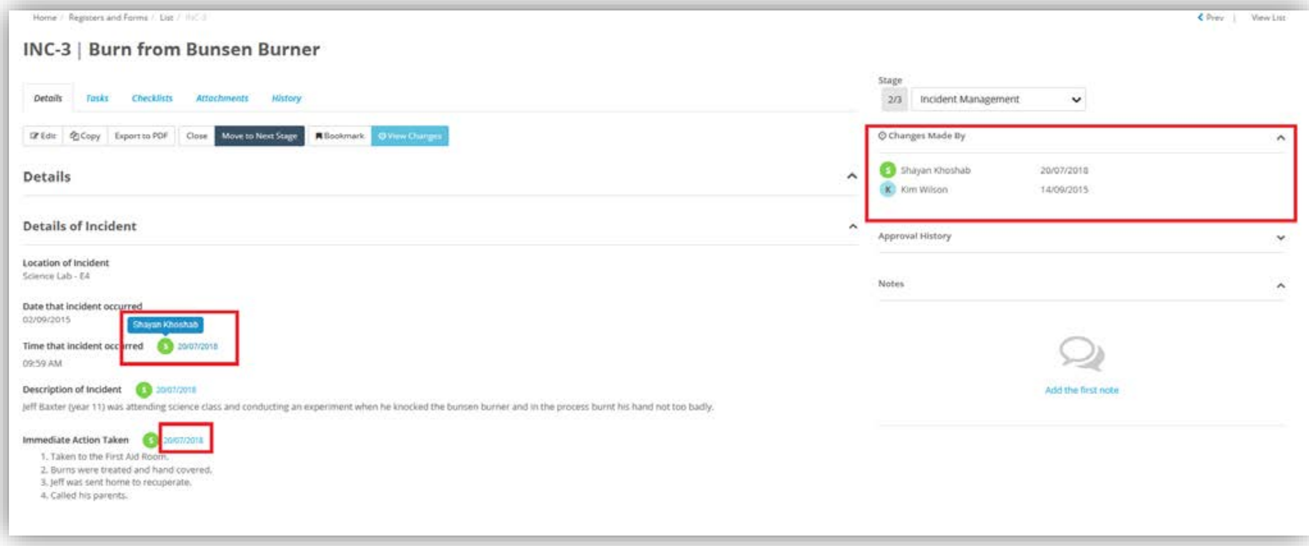


When View Changes is active the button will be blue and new icons will appear on screen next to the field/areas of the form that changes have been made to:

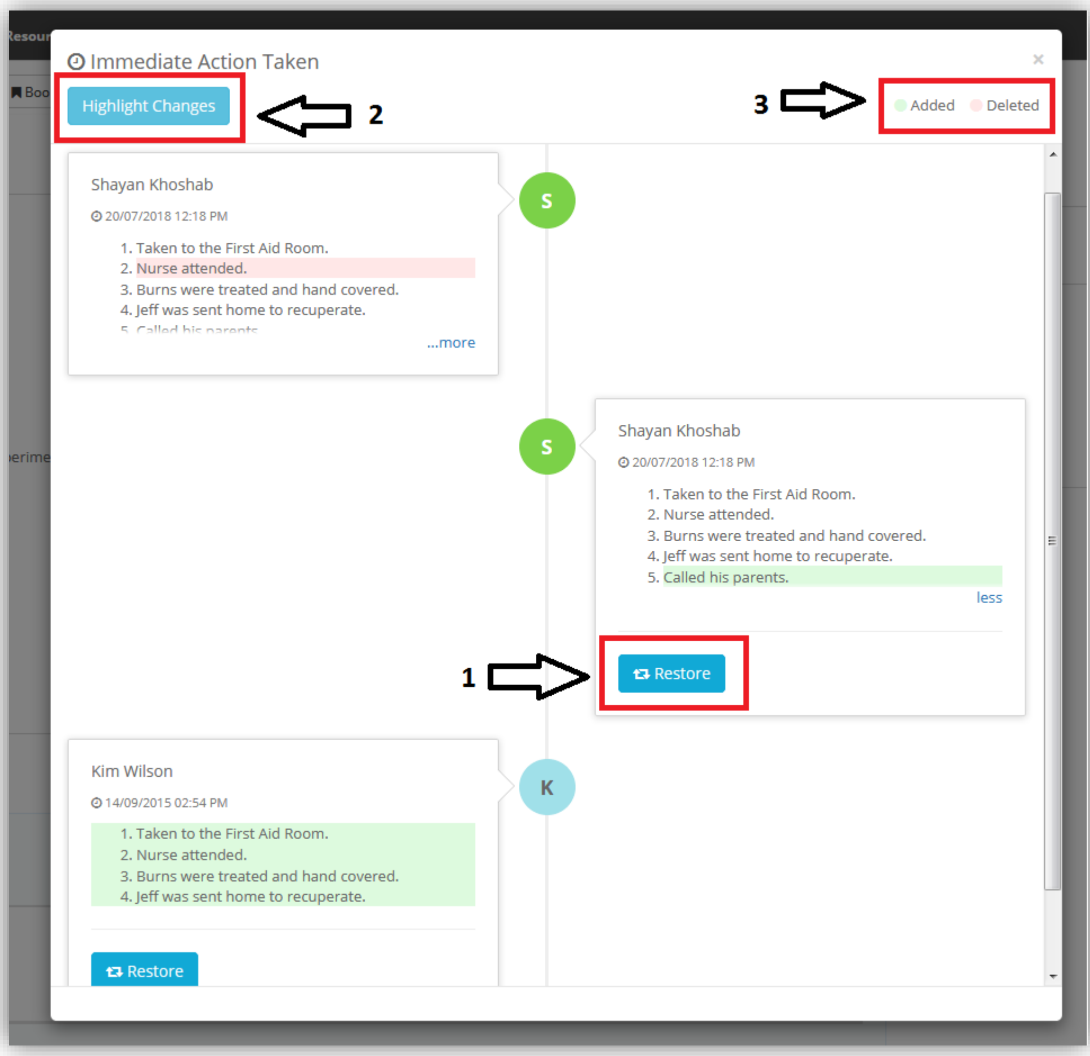


These icons indicate that a change has been made to the field after its original creation. If there is no icon, then the field has not been changed.

The circle indicates *who* made the latest change with a blue time stamp showing *when* the change was made. You can hover over the icon to see the user’s full name or view the full list of users who have made changes in order of most recent to oldest:

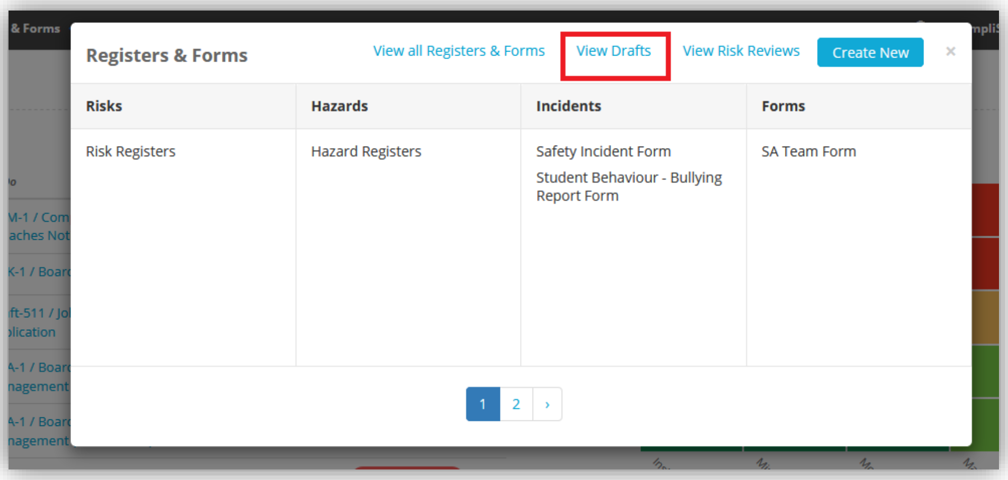


When you click on either the circle or the date stamp, a popup will appear that shows a timeline of all the changes made to that field. If the field is a short or long text field, underneath the previous changes will be a ‘Restore’ (1) button, which allows restoring to a previous version of that entry into that field. Additionally, short and long text fields have a ‘Highlight Changes’ (2) button at the top left-hand side of the popup, which will highlight exactly what was added (in green) or removed (in red) (3) between changes to that field.

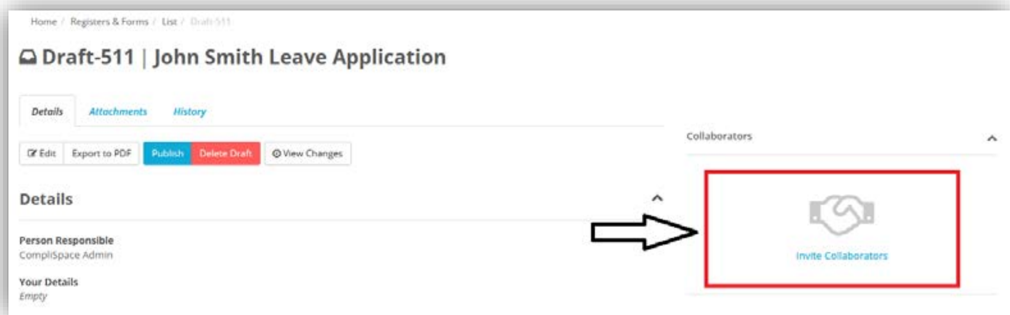


Draft Collaboration

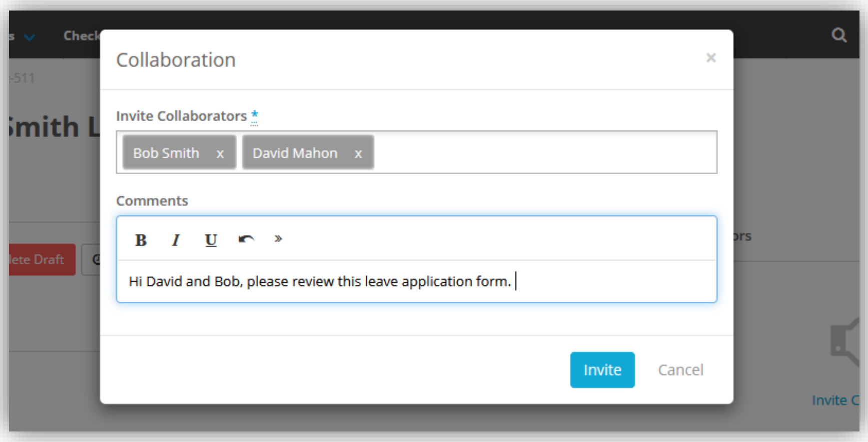
We have made enhancements to the Draft Registers and Forms feature introduced in release 210 with the introduction of Draft Collaboration. This allows you to invite other users to collaborate on a draft you have created before you publish it into the system as an official Registers and Forms entry. To do this, navigate to the draft you want:



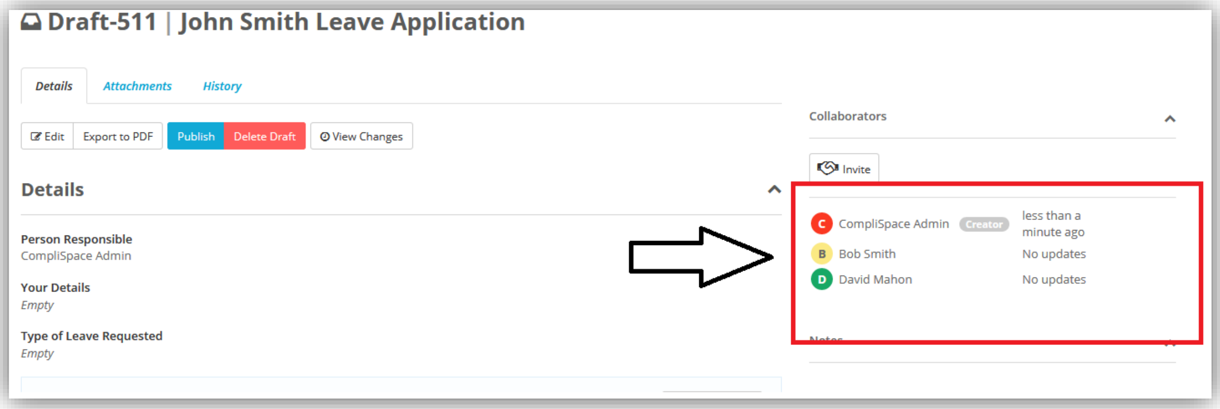
On the right side of the screen under Collaborators, click on the blue Invite Collaborators link:



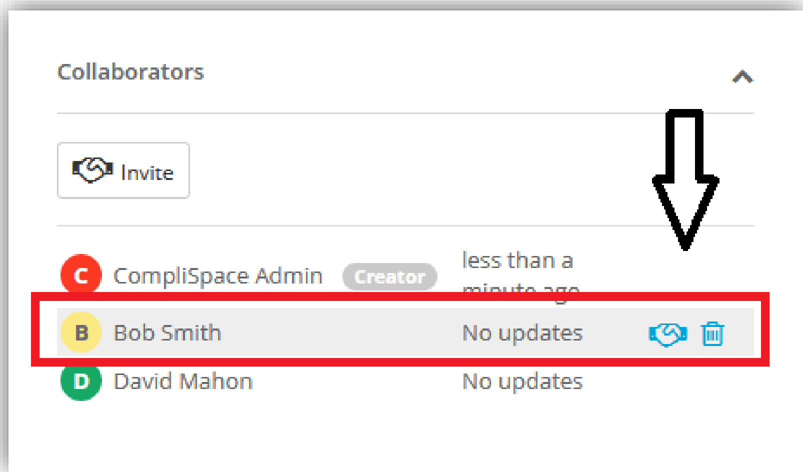
This will open a popup where you can select the users you want to invite as collaborators (note: only Full Users can be invited as collaborators and they must have edit right access to the relevant Registers and Forms template before being able to be selected). There is also a comment field, which will be included in the email sent out to the invited user(s) together with a link to the relevant draft.



Invited collaborators are listed on the right-hand side. The icons next to the user names are used to distinguish users for the Track Changes feature. Whenever a collaborator makes a change to a field it will be recorded by Track Changes.

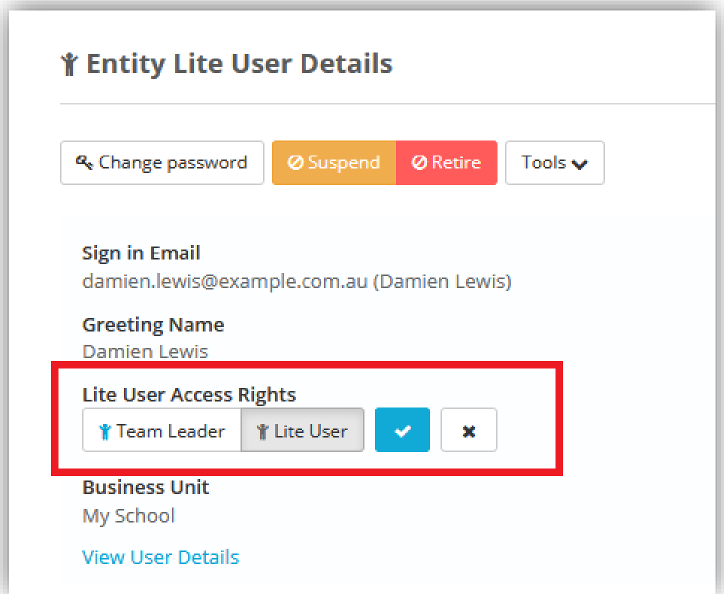


When hovering over a user row two icons will appear: a handshake and a rubbish bin. The handshake icon is used to re-invite the user by re-sending them an invitation email. The bin icon is used to remove the user as a collaborator, which means they will no longer be able to access this draft.



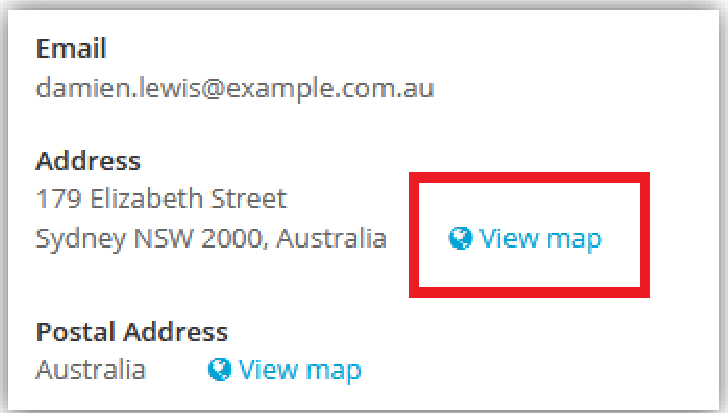
Multiple Lite Users per Entity

In this release we have changed the way Lite Users work so that they can now be attached to Contacts on an Entity. An Entity can now have multiple Lite Users as long as there is a separate Contact for each one. There are also two options for setting up a Lite User: **Team Leader**, which means this Lite User has access to every Action/Checklist assigned to **any Lite User associated with this entity** AND **Lite User**, which means the user has rights only to Actions/Checklists assigned to them.



Locate Addresses on Google Maps

Address Fields in Assurance now have a View Map button next to them, which will open the address in Google Maps:

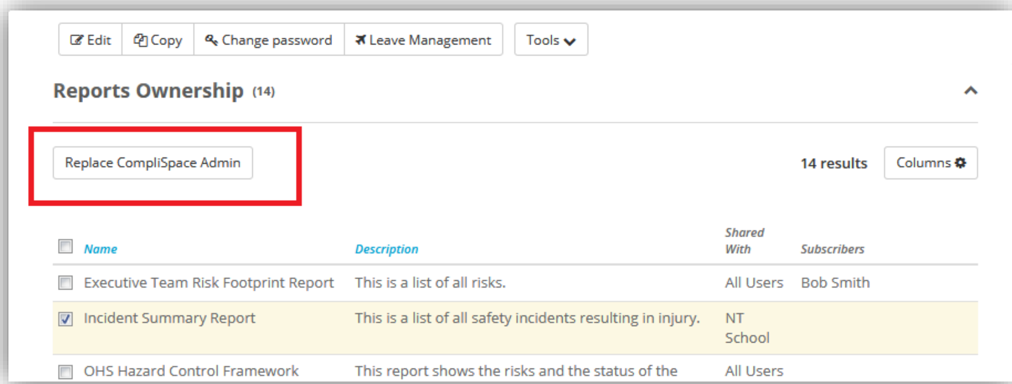


Retire Attachments

Attachments on Assurance can no longer be deleted, instead they are retired and can be accessed through the Attachments tab of each Register and Form entry:

Changing Ownership of Custom Reports

When a new custom report is created the owner is set as the user who created it. Unless the report is shared they are the only person who can access it. However, ownership of a report can now be changed from the User screen:



User Interface Enhancement for Linked Registers and Form

We've enhanced the UI for linking Register and Forms to each other to make the experience easier and more intuitive: