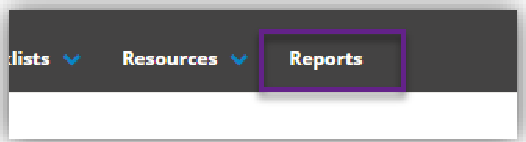
Reports Enhancements

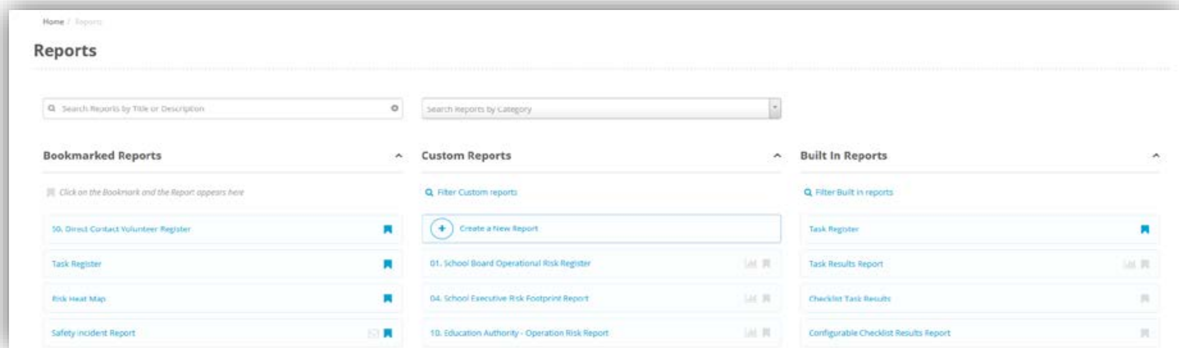
New Reports Interface

This release delivers a new reports interface providing easier access to search, filter and create reports users require. To access the report screen in Assurance, click the Reports button at the top of the screen:

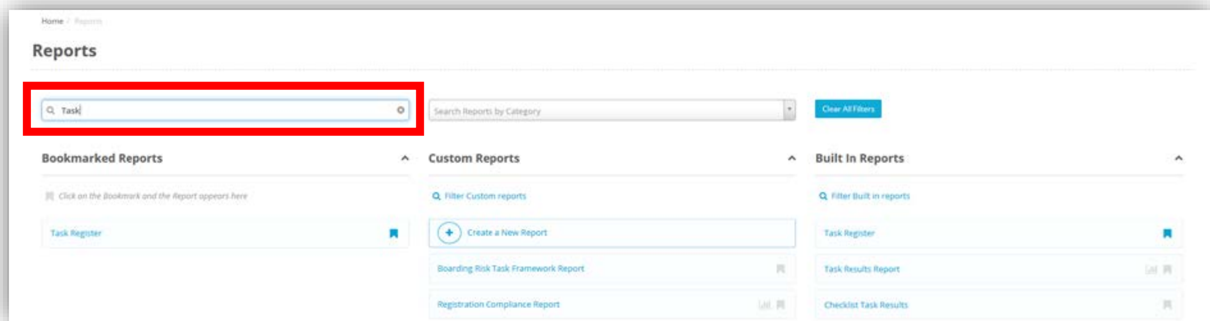


The Assurance Report screen shows every report that you have access to grouped into three columns:

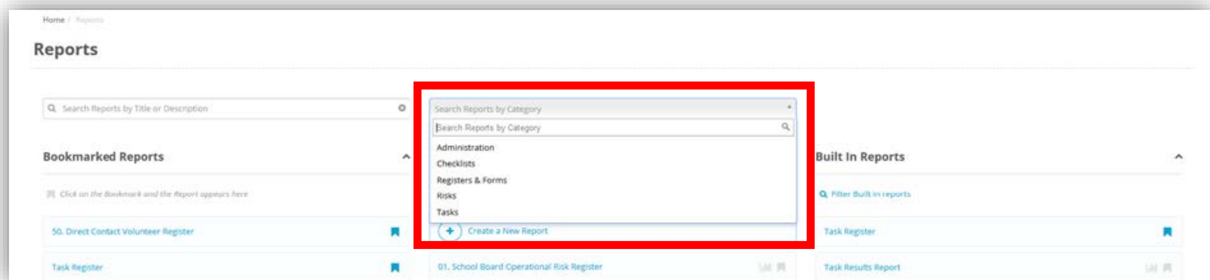
- ✓ **Built-in Reports:** The base reports that come with every new Assurance site.
- ✓ **Custom Reports:** Customised reports that have been created either by you or by another user and shared with you.
- ✓ **Bookmarked Reports:** Reports that you have bookmarked. These may be either Built-in or Custom reports.



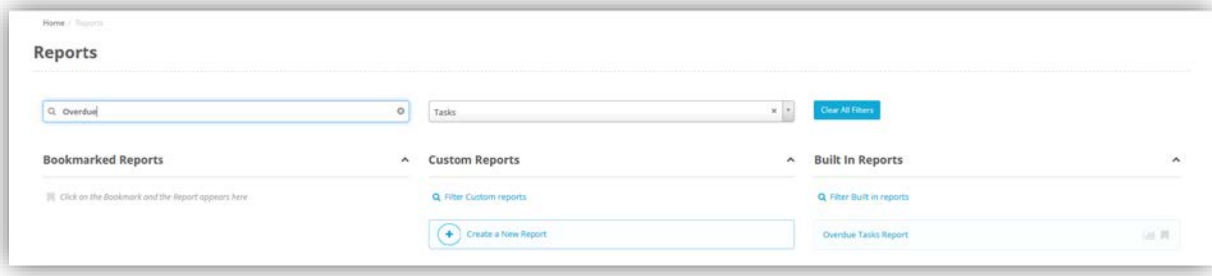
You can filter the reports screen either by typing report name into the search box in the top left:



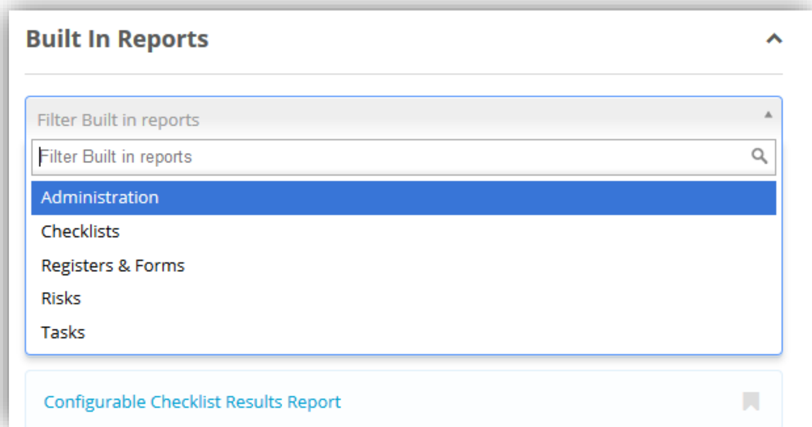
Or by selecting a category using the dropdown next to the search box:



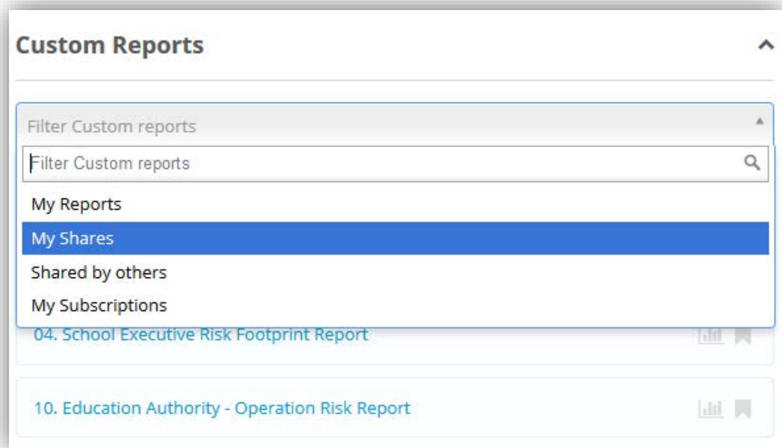
Note: If you want to fine tune your search you can use both options together:



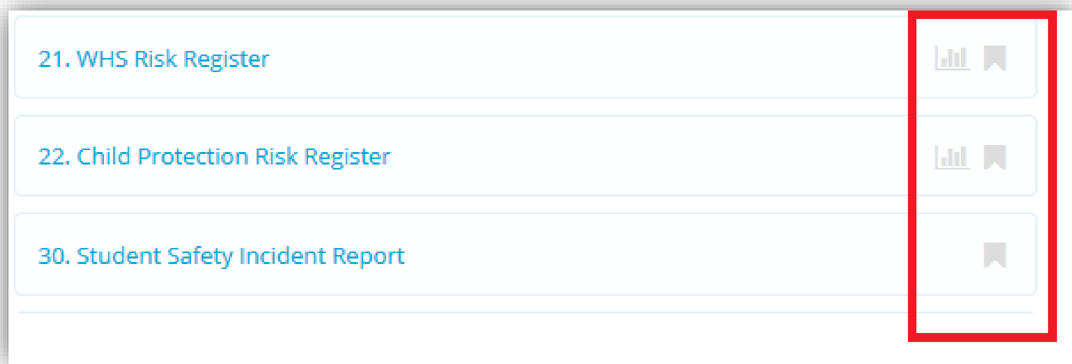
You are also able to filter the Custom and Built-in Reports columns individually. The Built-in Reports column has the built-in categories as options for filtering:



The Custom Reports column has options for reports that you have created, reports that you have shared with others, reports that have been shared with you, and reports that you have subscribed to:

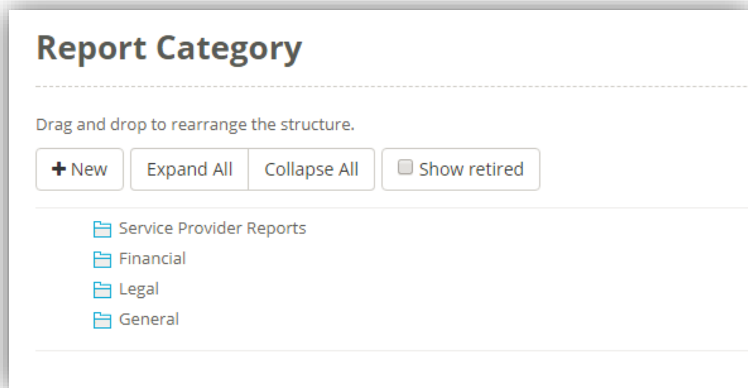


You can use the Reports Screen to bookmark reports by clicking the bookmark icon to the right of a report name:

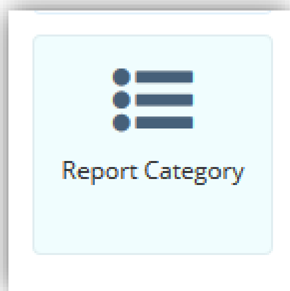


Reports Categories

As part of the new reports user interface we have added Report Categories. This allows you to group similar reports together to make it easier to find reports:

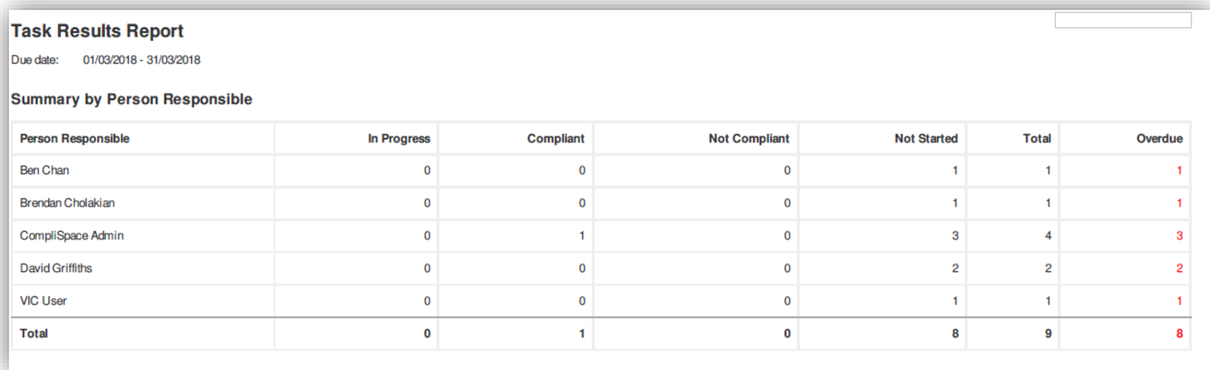


You can add new Report Categories by navigating to the Administration section and clicking the below icon:



Charts and Report Summaries

We have added new charts and report summaries to two reports: Tasks Results Report and Checklist Schedule & Status Report:



Task Results Report

Due date: 01/03/2018 - 31/03/2018

Summary by Person Responsible

Person Responsible	In Progress	Compliant	Not Compliant	Not Started	Total	Overdue
Ben Chan	0	0	0	1	1	1
Brendan Cholakian	0	0	0	1	1	1
CompliSpace Admin	0	1	0	3	4	3
David Griffiths	0	0	0	2	2	2
VIC User	0	0	0	1	1	1
Total	**0**	**1**	**0**	**8**	**9**	**8**

New Reports

Overdue Checklist Report

This release includes a new report called the Overdue Checklist Report, which provides an overview of overdue checklists in your organisation. This report includes summaries and charts:

Overdue Checklist Report

Summary by Person Responsible

Person Responsible	<1 month	1-3 months	3-6 months	6-12 months	>12 months	Total
Ben Chan	0	0	1	0	0	1
CompliSpace Admin	0	0	2	1	2	5
David Griffiths	0	0	0	0	1	1
Dearne Cameron	0	0	0	0	3	3
James Field	0	0	0	0	2	2
Robert Seale	0	0	0	0	1	1
VIC User	1	2	3	6	4	16
Total	1	2	6	7	13	29

Overdue Task Report

We have also included a new report that provides an overview of overdue tasks in your organisation. The Overdue Task Report also includes summaries and charts similar to the Overdue Checklist Report:

Overdue Tasks Report

Person Responsible: Ben Chan, Brendan Cholakian, CompliSpace Admin, David Griffiths, James Field, Shayan Khoshab

Summary by Person Responsible

Person Responsible	<1 month	1-3 months	3-6 months	6-12 months	>12 months	Total
Ben Chan	1	3	4	0	0	8
Brendan Cholakian	1	0	0	0	0	1
CompliSpace Admin	2	2	0	0	0	4
David Griffiths	2	1	2	4	2	11
James Field	0	0	1	0	0	1
Shayan Khoshab	0	0	2	1	1	4
Total	6	6	9	5	3	29

Risk Task Framework Report

This is a new report gives you the ability to list the risks and control tasks and assignments linked to those risks in your organisation.

Registers and Forms Notes Report

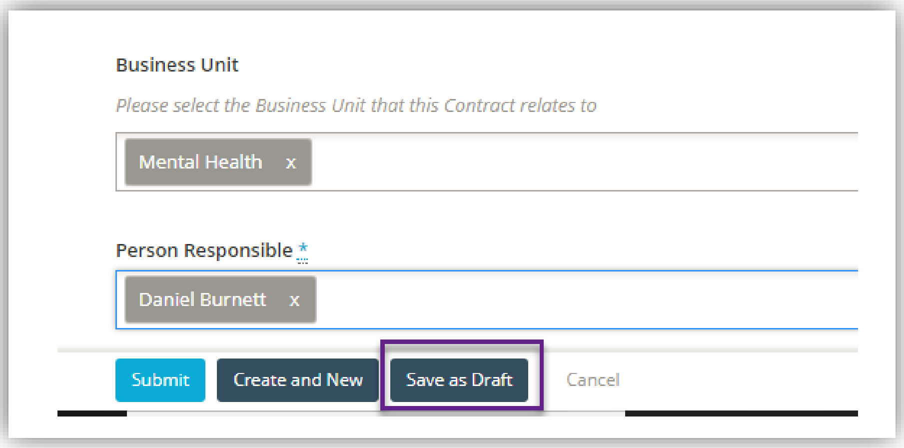
The Registers and Forms Notes Report is a new report that shows a list of Registers and Forms in your organisation and the most recent notes that have been added against those Registers and Forms:

Draft Registers and Forms

Save as Draft

We have added the functionality of saving a new Registers and Forms entry as a draft. When creating a new Registers and Forms entry, if you want the details of the Registers and Forms to be saved, but the data isn't ready to be formally accepted into the system yet, then you can save the entry as a draft.

To do this, while creating an entry there will be an option at the bottom of the page next to Create and New called Save as Draft:

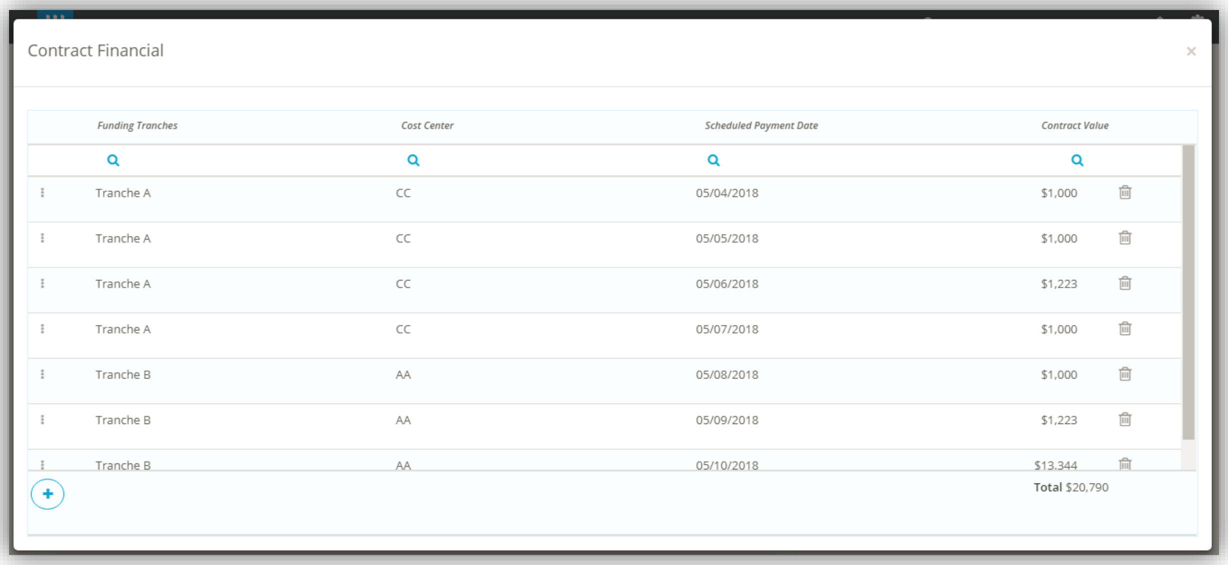


Draft Registers and Forms will not appear in reports or the Registers and Forms list and can be deleted permanently if they are not needed.

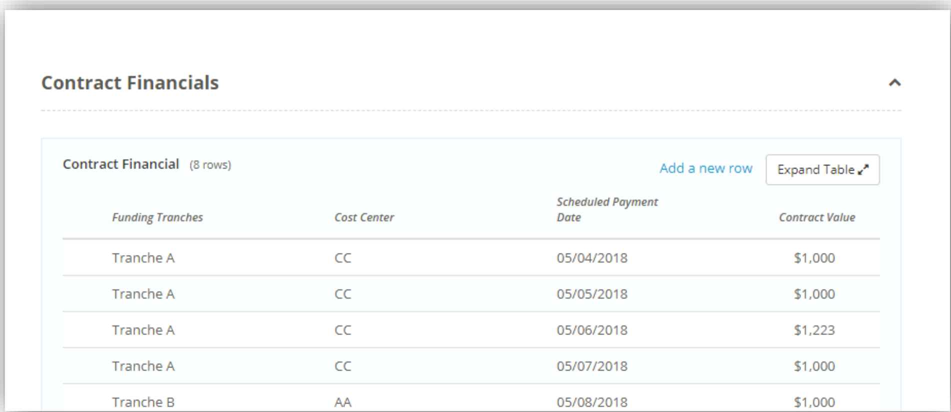
More Enhancements

Expanded Table View

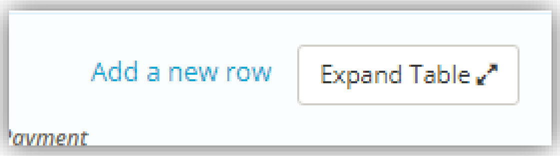
Improved performance for viewing large tables provides more flexibility for Assurance users. The introduction of row filtering and the ability to reorder tables allows users to perform a number of operations not available via the normal view.



To see the expanded table view, go to the Register or Form you want to edit and scroll to the table you need.

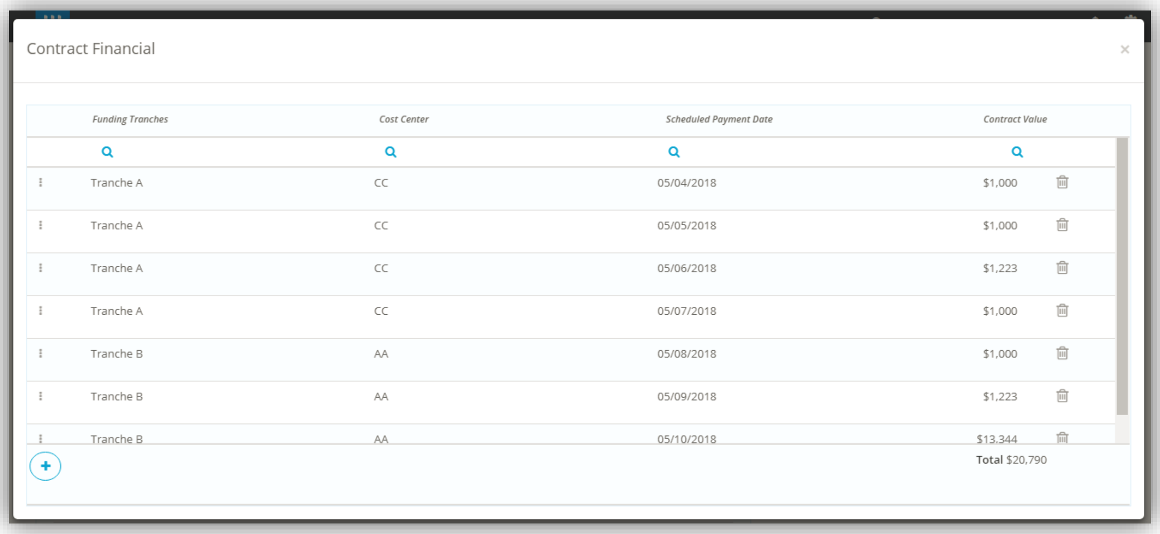


Then to expand the table click the **Expand Table** button, or the **Add a new row** link next to that if you want to start adding new rows immediately:



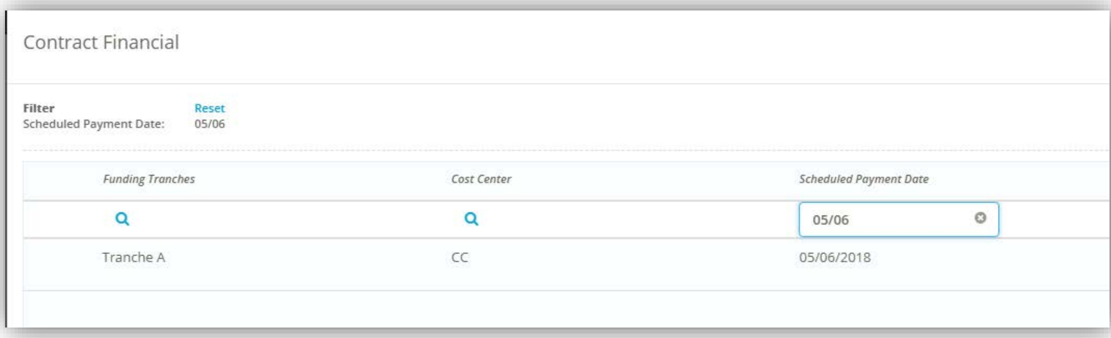
Note: Tables with more than 10 rows can only be seen in Edit mode on the Register or Form or by expanding the table.

When you click the **Expand Table** button a popup will appear that looks like:



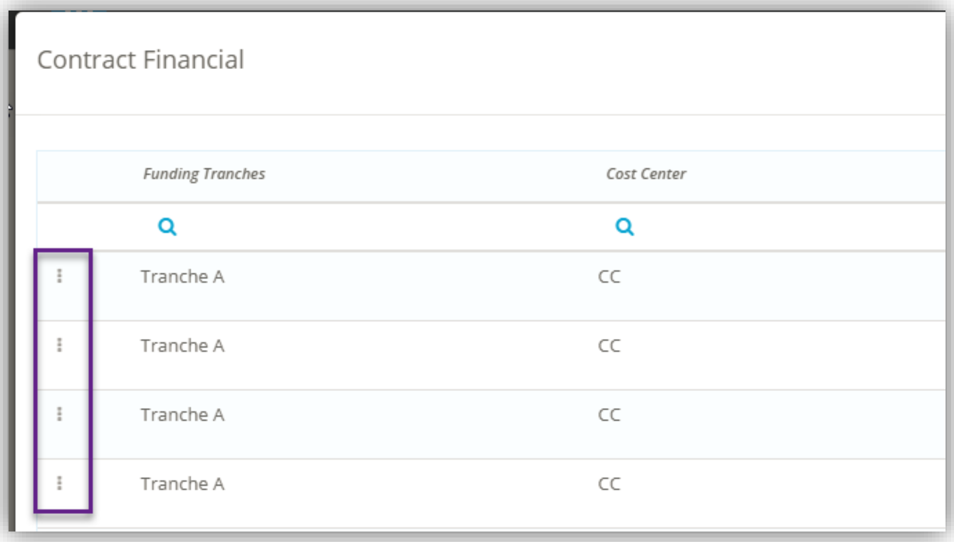
You can add rows to the table by clicking the blue + at the bottom of the popup and delete rows by clicking the trashcan to the right of the rows.

To filter the table click the magnifying glass under the column you want to filter by, then enter the value:



Note: you can filter by more than one column at the same time.

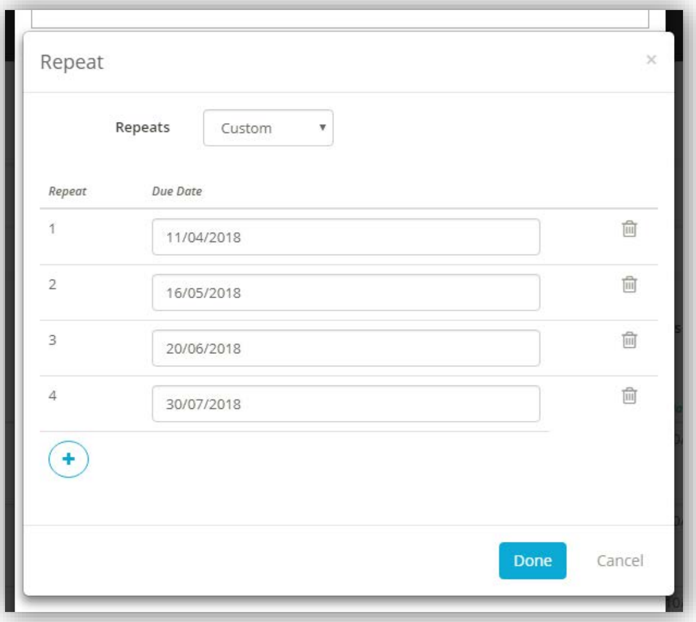
If you want to rearrange rows in your table, click and drag the three dots on the left side of the row:



Note: After you have added or rearranged rows in the table, the Register or Form will refresh and apply the changes when you close the expanded view.

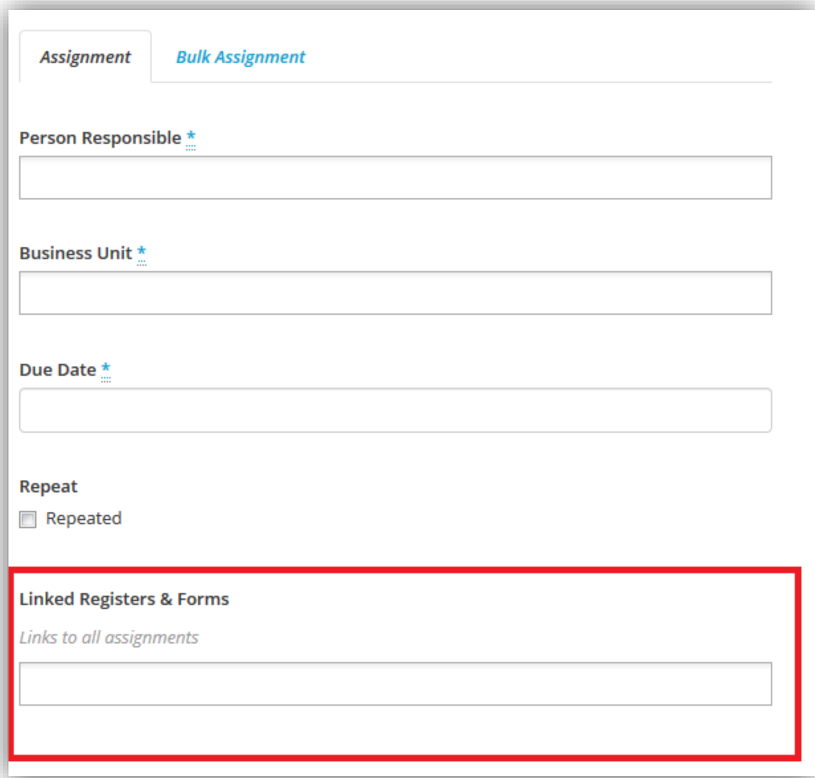
Custom Repeats for Task and Checklist Assignments

In addition to the existing fixed-length repeats, we have added the ability to make custom repeats for assigning tasks and checklists:



Link Registers and Forms while assigning Tasks and Checklists

We have added the ability to link a task or checklist assignment to a Register and Form while you are making the assignment.

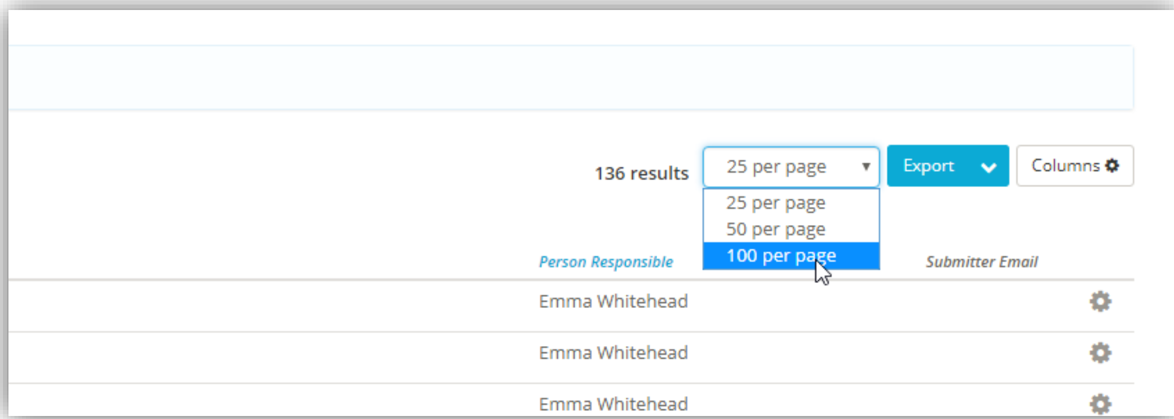


Link Registers and Forms individually through Bulk Assignment

Not only can you link Registers and Forms while making bulk assignments of Tasks and Checklists, you can also link each individual assignment that is made to different Registers and Forms:

Ability to increase number of results on list view

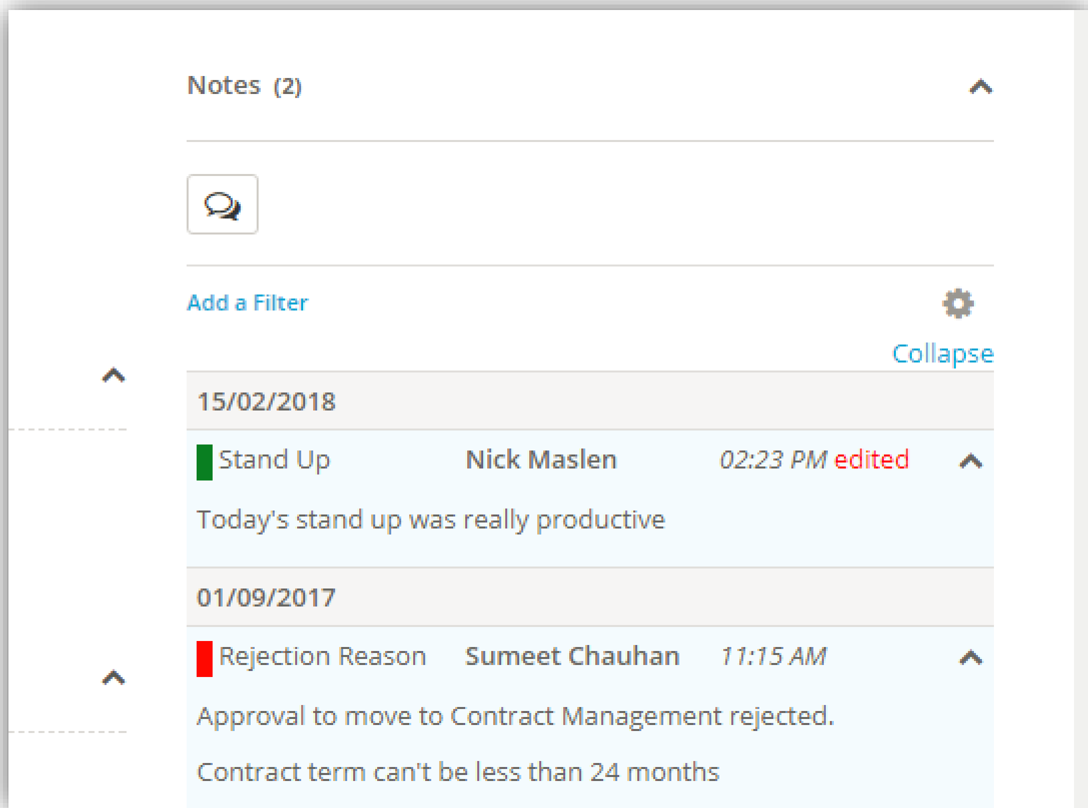
On any list screen in Assurance (Registers and Forms, Users, Entities etc.) you are now able to change the number of results per page from 25, to either 50 or 100:



The default is 25 results per page.

Notes Enhancements

We have made a change to the way notes are handled on Registers and Forms. Notes are now expanded by default when opening a Register or Form, and can be collapsed if needed:



We have also paginated the Notes Snapshot, and only the five most recent notes are displayed at a time.

Make History Full Screen

The history tab now goes to the end of the screen to make the information displayed clearer to the user: