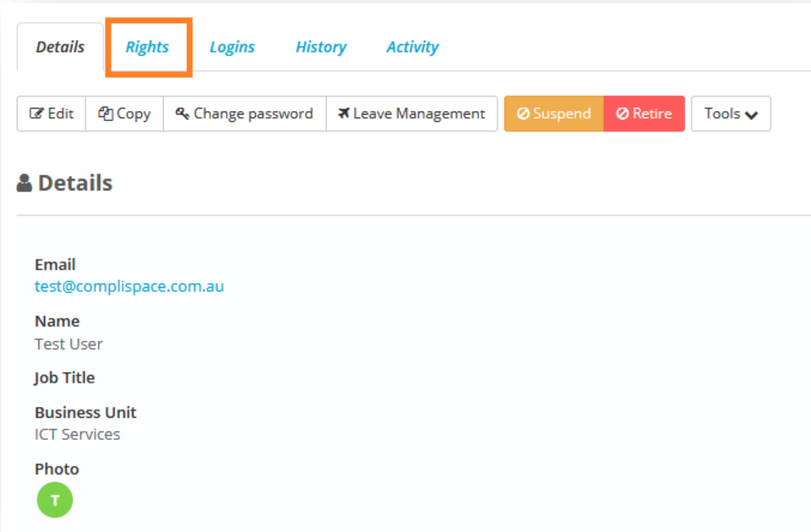
Business Unit Manager

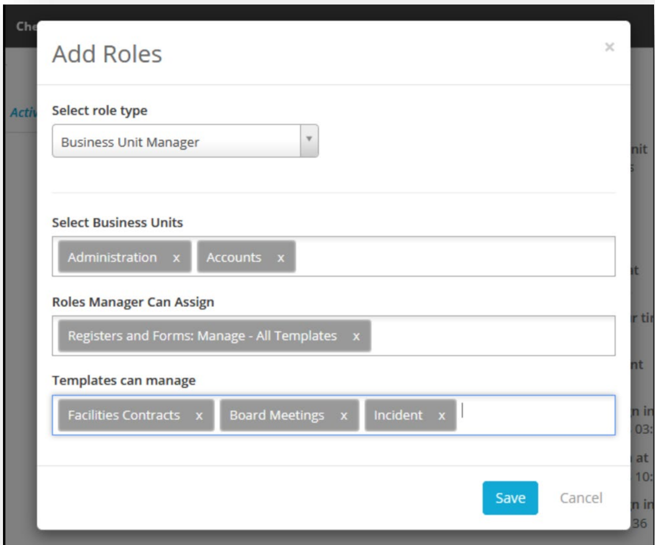
The new Business Unit Manager role assigns administrators to specific business units within the same Assurance site to provide certain users with additional administrator capabilities as outlined below.

Business Unit Managers are users who have admin access to specific business units to manage users within those business units. They also have limited access to Registers and Forms Templates and Launchpads. Only Super Users are able to allocate this role.

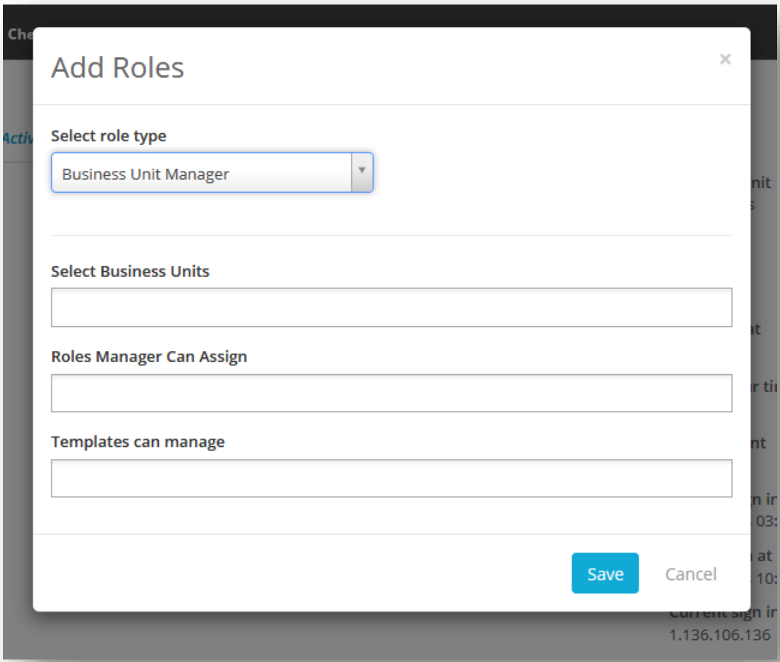
To make a user a Business Unit Manager, navigate to their user page and click on the Rights tab:



On the Rights tab select +Add Role, then on the pop up that appears under Role Type select Business Unit Manager

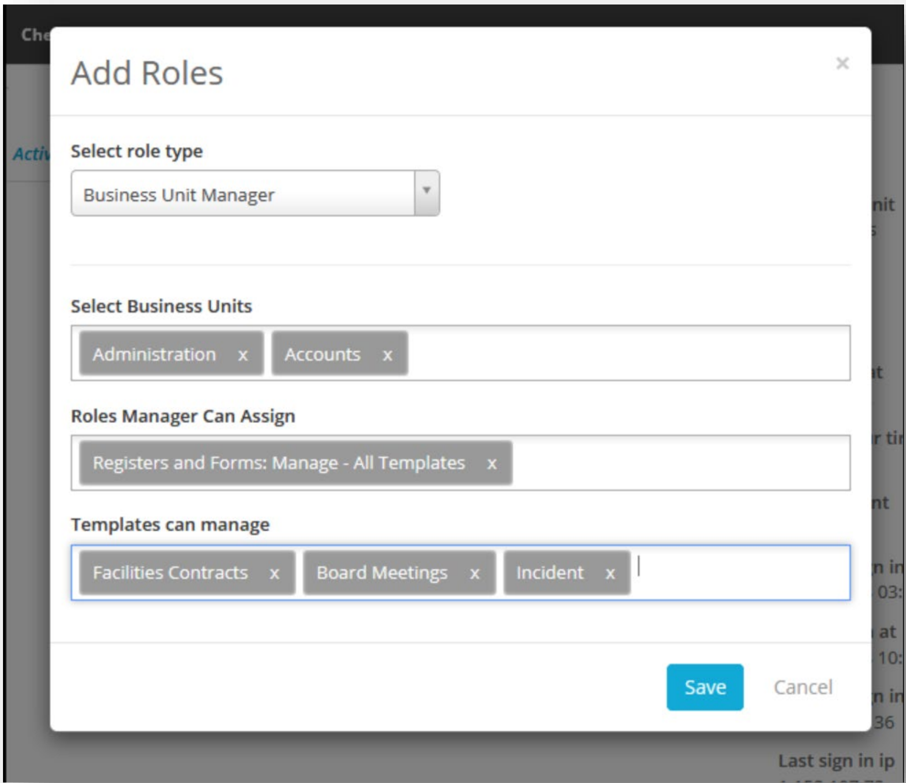


This will bring up several fields to fill out:

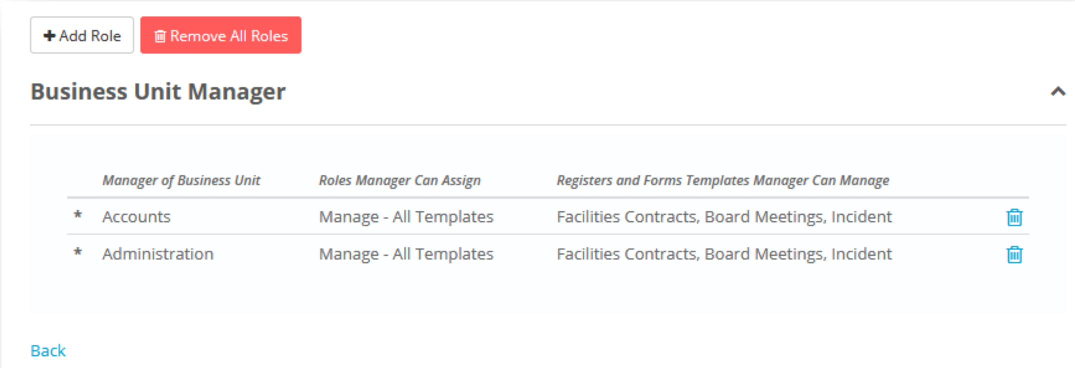


- **Select Business Units:** These are the business units that this user can manage. For example, if you select the business unit 'Finance', then this user will be able to manage any user in the Finance business unit.
- **Roles Manager Can Assign:** Roles the Business Unit Manager to assign to the users in their nominated business units. .
- **Templates can manage:** Registers and Forms templates that this user will have access to and manage.

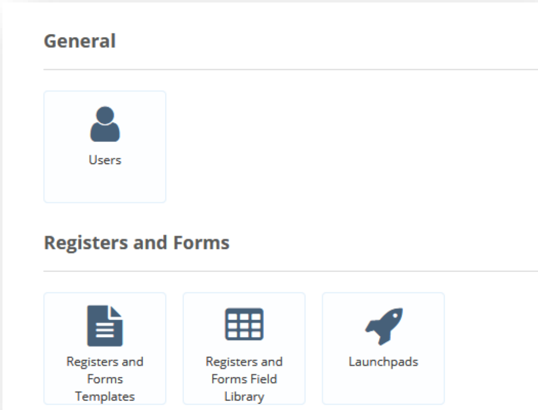
Once you have filled this out, click ‘Save’.



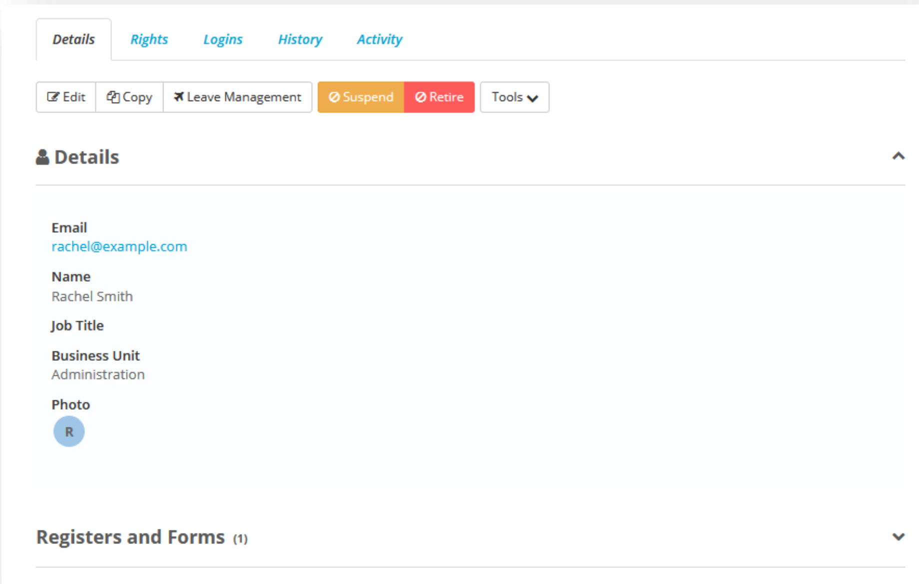
You will then see this user's Business Unit Manager rights, separated by business unit:



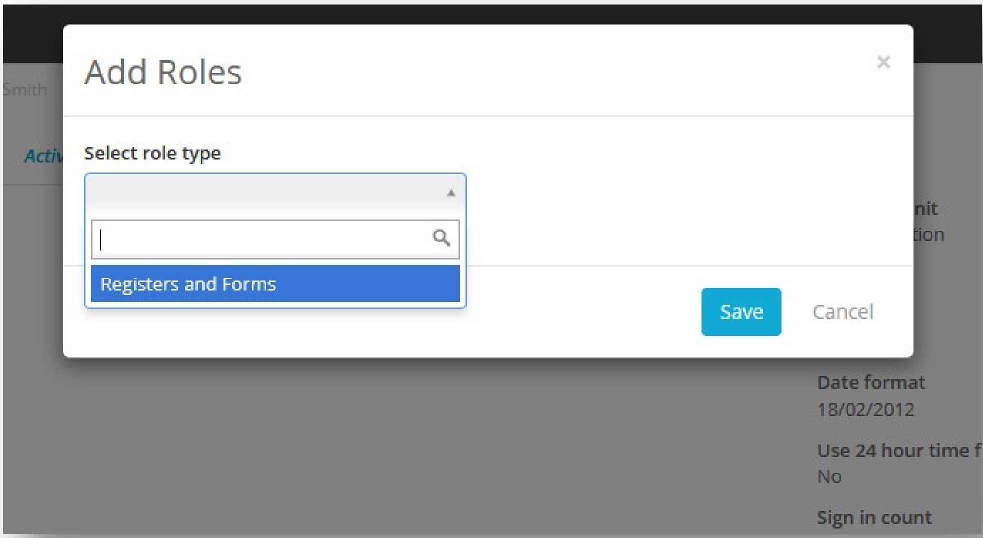
When this user logs into Assurance they will be able to access the admin screen, but will see a restricted view:



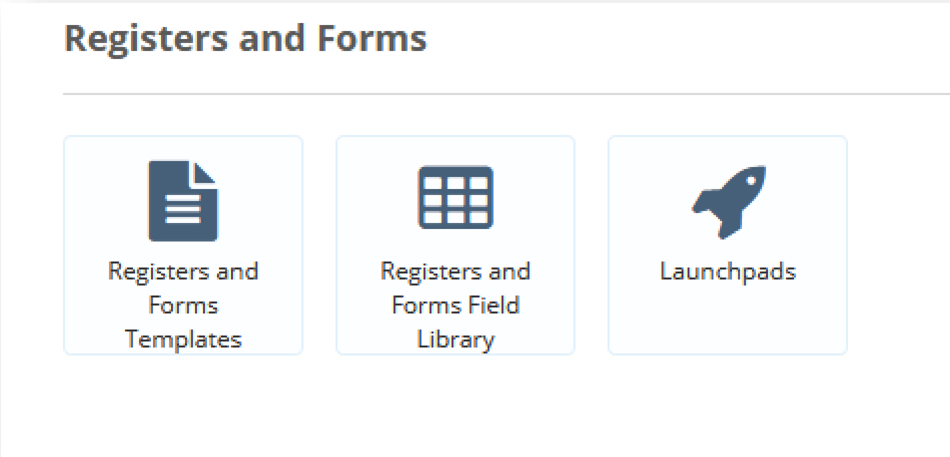
Under Users, they will only see users who are in the Business Units that they have been given access to. The Business Unit Manager can edit these users and see what Registers and Forms/Tasks/Checklists they have assigned to them:



Under the Rights tab, the Business Unit Manager will be able to remove any of the users' access rights, but can only assign the rights that the Business Unit Manager was given access to:



Under the Registers and Forms section on the admin page the Business Unit Manager can manage the specific templates that they were given access to.



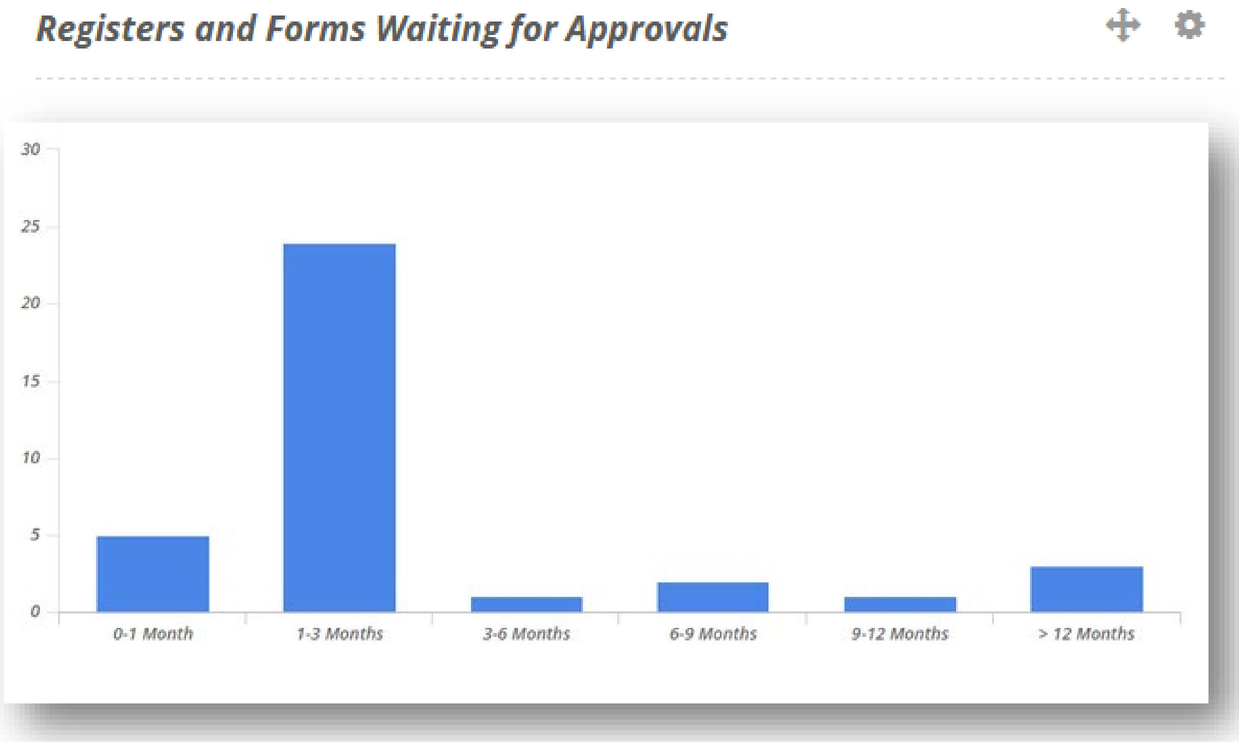
There are several restrictions:

- The user is restricted within their nominated business unit(s). This applies to setting up Launchpads and when adding users to custom notifications on the template.
- The user **cannot** retire a template or make it super-sensitive.
- The user **cannot** create new templates.
- The user **cannot** create new fields or edit existing fields. They can only use fields from within the Registers and Forms Field Library.

Note: When it comes to approvers and users set up in custom notifications, the Business Unit Manager can remove **any user already set up** but can only add users from **within the Business Unit(s) they manage.**

Registers and Forms Waiting for Approval Snap Shot

There is now a snapshot overview of Registers and Forms that are pending approval, broken down by how long they have been waiting:



Register and Forms Waiting for Approval Report

This release includes a new report called the Registers and Forms Waiting for Approval Report. This report allows you to see a list of all Registers and Forms that are currently pending approval, which users they are waiting on, and how long they have been in the pending approval state:

Days Pending Range: <1 month

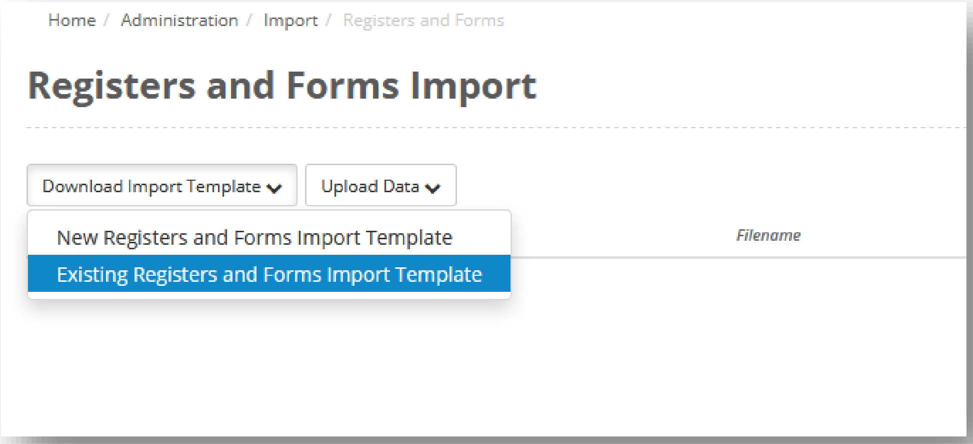
Key	Title	Stage	Approvers	Submitted for Approval	Days Pending
OCT-16	Healthy Minds	Contract Establishment	Sumeet Chauhan	05/10/2018	17
OCT-17	Copy of IT Services Test Summary	Contract Establishment	Sumeet Chauhan	15/10/2018	7
OCT-18	Copy of Healthy Minds	Contract Establishment	Sumeet Chauhan	18/10/2018	4
OUT-2	IT Services test action	Contract Drafted	Joey Wheeler,Joey Fakename	25/09/2018	27
OUT-20	OUT	Contract Establishment	Joey Fakename	25/09/2018	27

Days Pending Range: 1-3 months

Key	Title	Stage	Approvers	Submitted for Approval	Days Pending
OCT-5	Title 2	Contract Establishment	Sumeet Chauhan	06/09/2018	46
OCT-6	Title 3	Contract Establishment	Sumeet Chauhan	06/09/2018	46
OCT-7	Title 4	Contract Establishment	Sumeet Chauhan	06/09/2018	46
OCT-8	Title 5	Contract Establishment	Sumeet Chauhan	06/09/2018	46
OCT-9	Title 6	Contract Establishment	Sumeet Chauhan	06/09/2018	46
OCT-10	Title 7	Contract Establishment	Sumeet Chauhan	06/09/2018	46

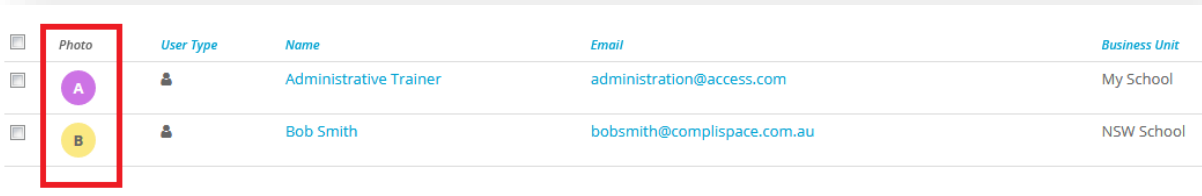
Bulk Updating Registers and Forms

Assurance can now update Registers and Forms entries in bulk, by importing into existing Registers and Forms. This feature is great for making changes to several Registers and Forms entries in one go, without having to go through each entry separately.

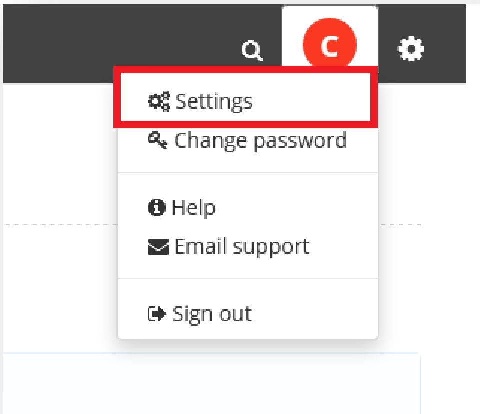


Avatars

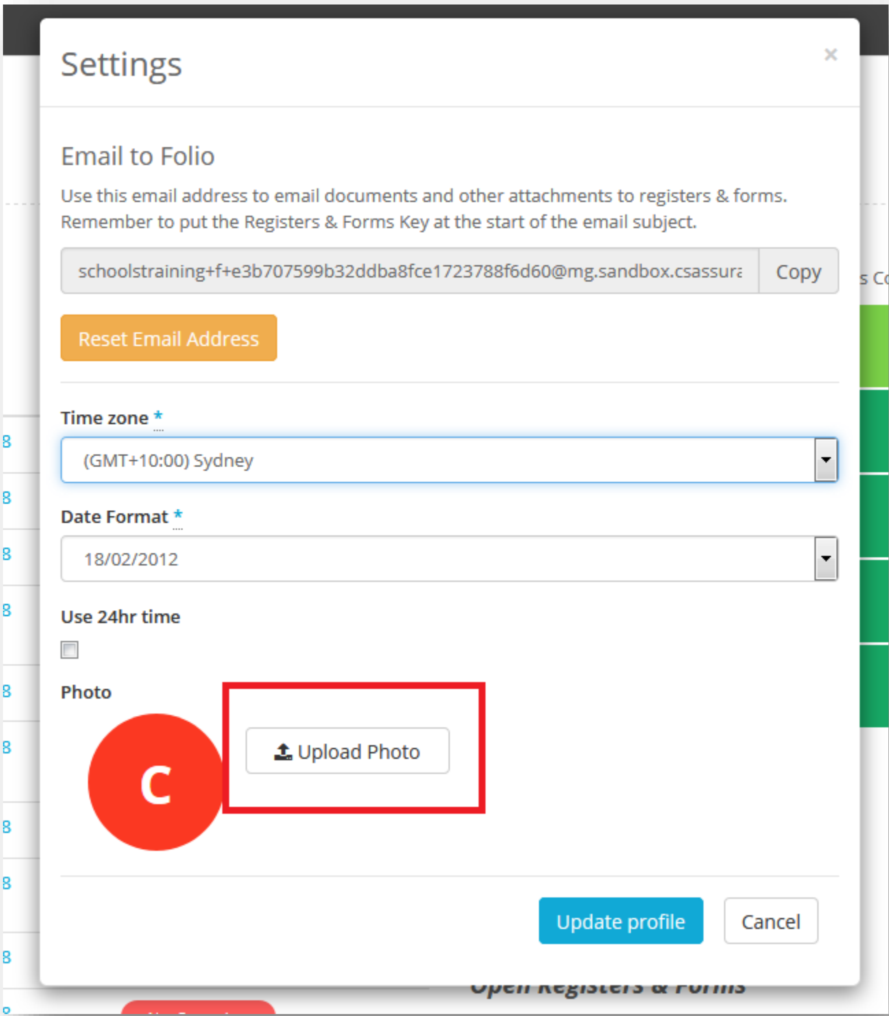
We are progressively introducing Avatars in Assurance to let you put a face to a name. An avatar is a photo/image that a user has uploaded to their profile that appears throughout Assurance to represent that user. If there is no Avatar, the user will be represented as a circle with the initial of their first name:



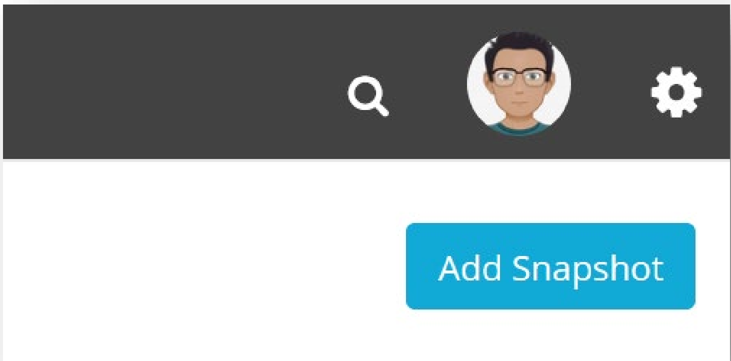
To upload a photo/image to use as your avatar, click on your avatar in the top right-hand corner of the screen and select Settings:



On the settings popup, click on **Upload Photo**, then select the photo you want to use from your computer.



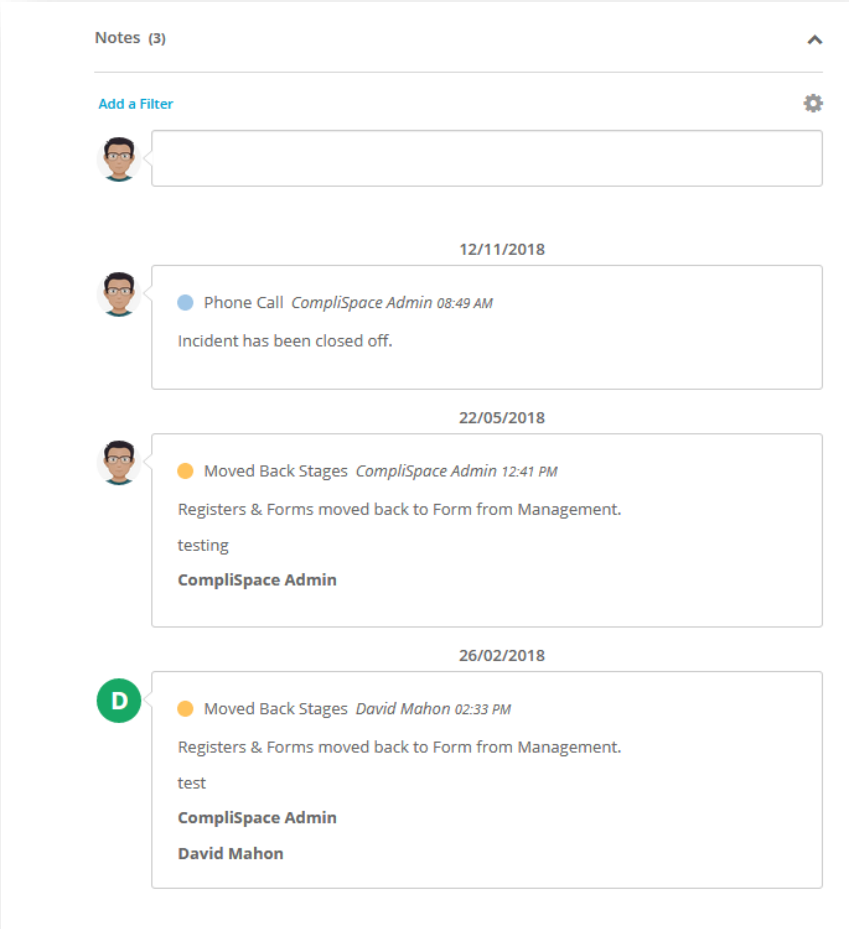
Once it has finished uploading, you will see the photo you selected as your avatar:



Note: Administrators can upload photos on behalf of other users by editing a user through the User section in the Admin part of Assurance.

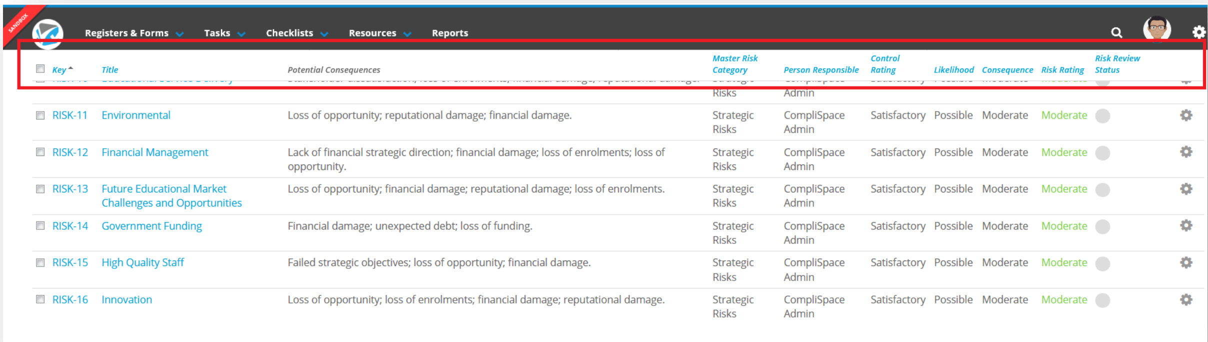
Registers and Forms Notes

As part of the Avatar refresh there is a fresh coat of paint on notes in Registers and Forms.



Registers and Forms List View Headers Dock

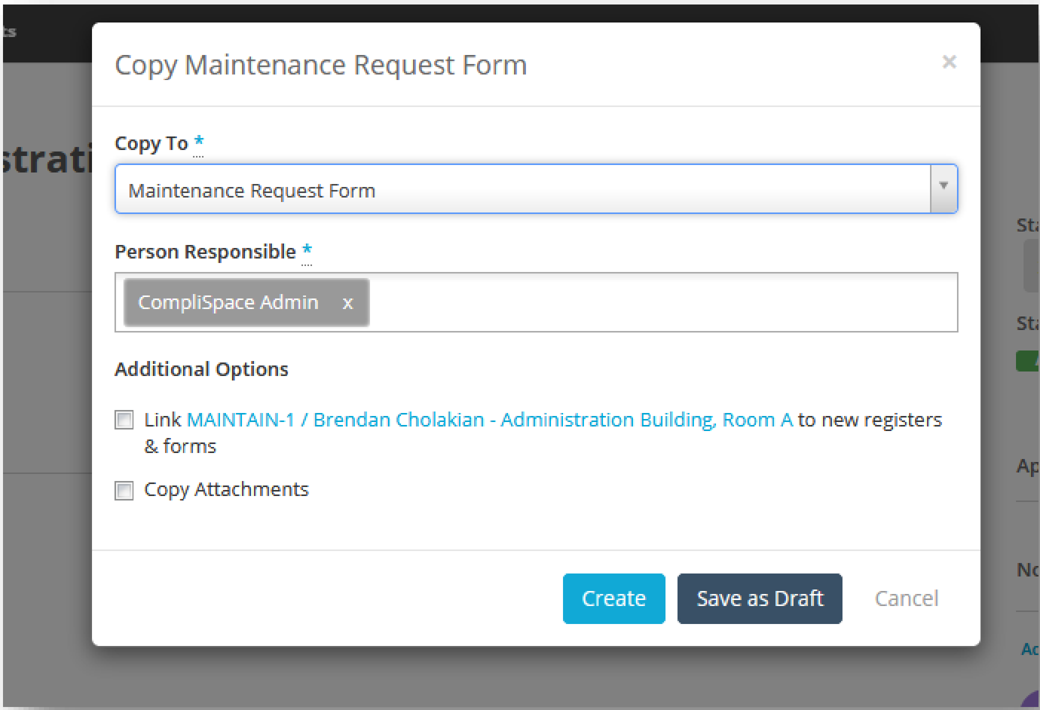
Another refresh we have made is to the List view, where the headers now stay docked while you are scrolling:



Copy a Register and Form Entry from One Template to a Different Template

We have noticed that Assurance users often need to copy an entry from one template to a different template. Some examples for why this needs to be done include:

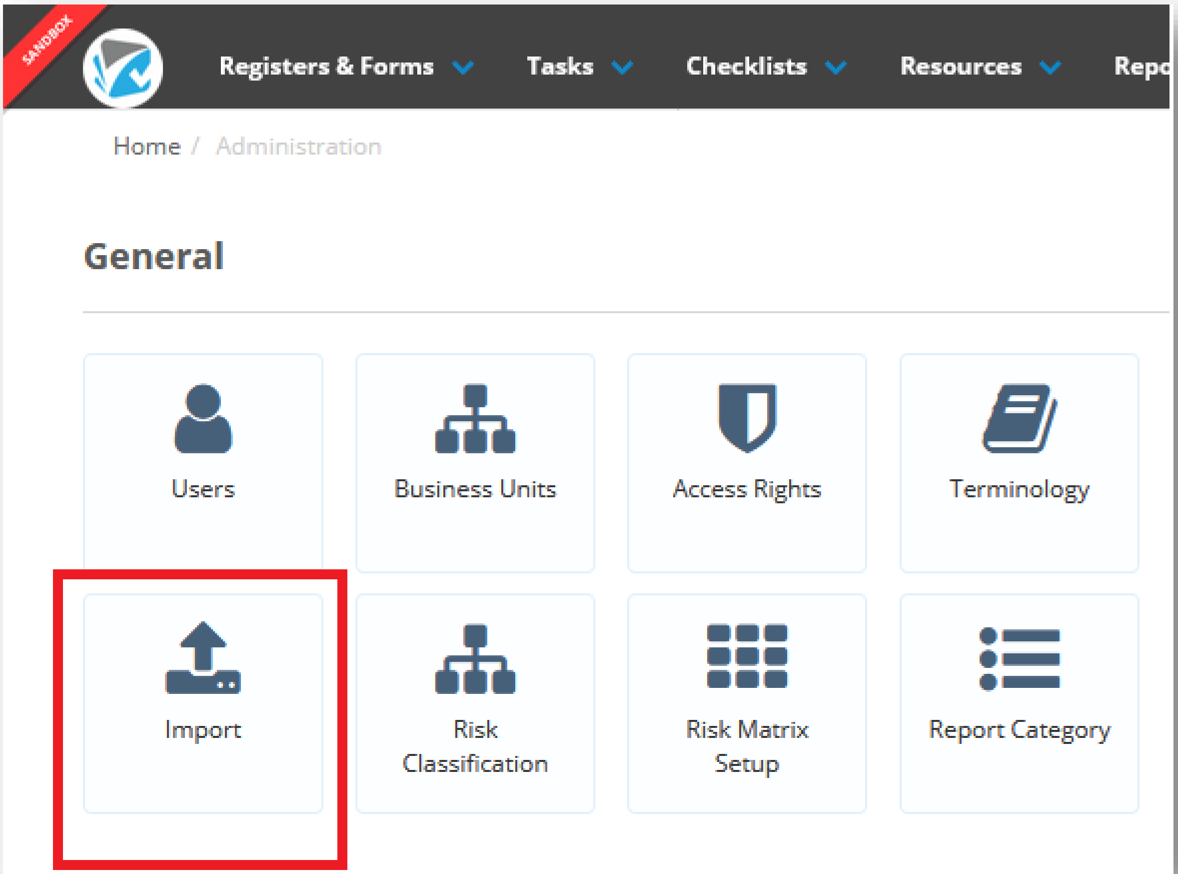
- One Register and Form template workflow may need to move into another. An example of this is when a job application needs to become an employment contract.
- A potential risk reported on a risk identification form needs to be made a risk in the risk register.
- You may have simply made a mistake and need to shift an entry across to the correct Register and Form template.



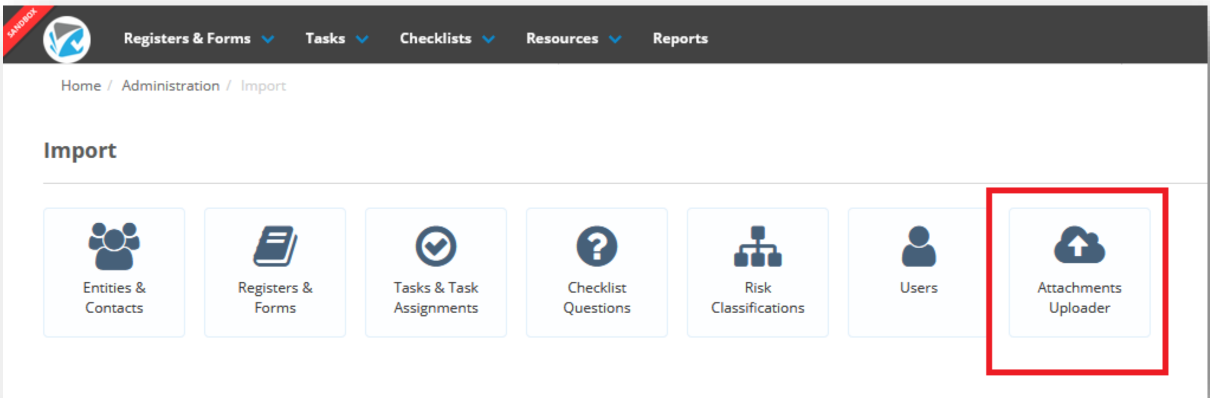
Attachment Uploader

This feature allows you upload documents to Assurance in bulk. Use the attachment uploader to pull all your documents into Assurance and map them to the appropriate Registers and Forms.

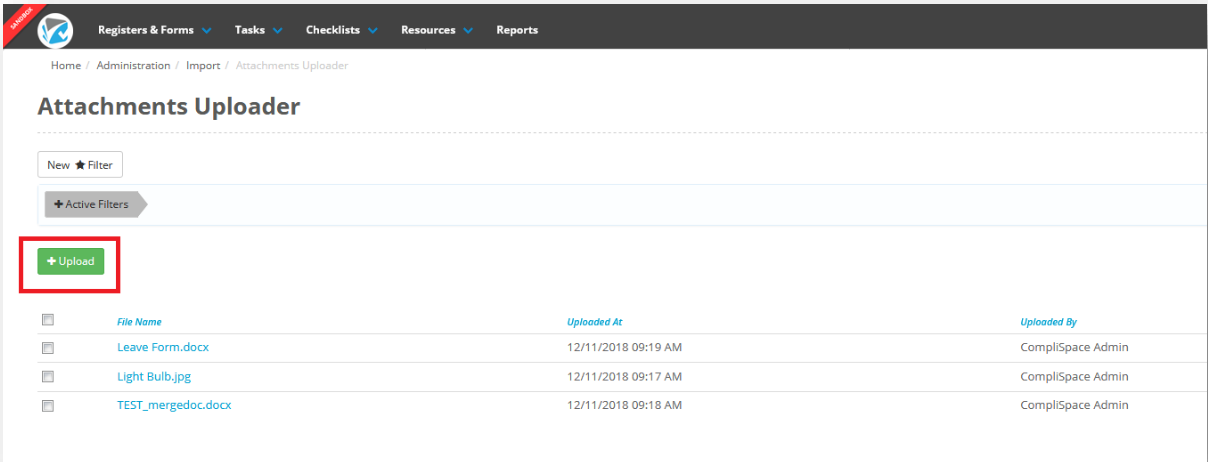
Bulk uploading attachments to multiple Registers and Forms is a two-step process in Assurance. For the first step, go to the admin screen then select Import:



Then Attachments Uploader:

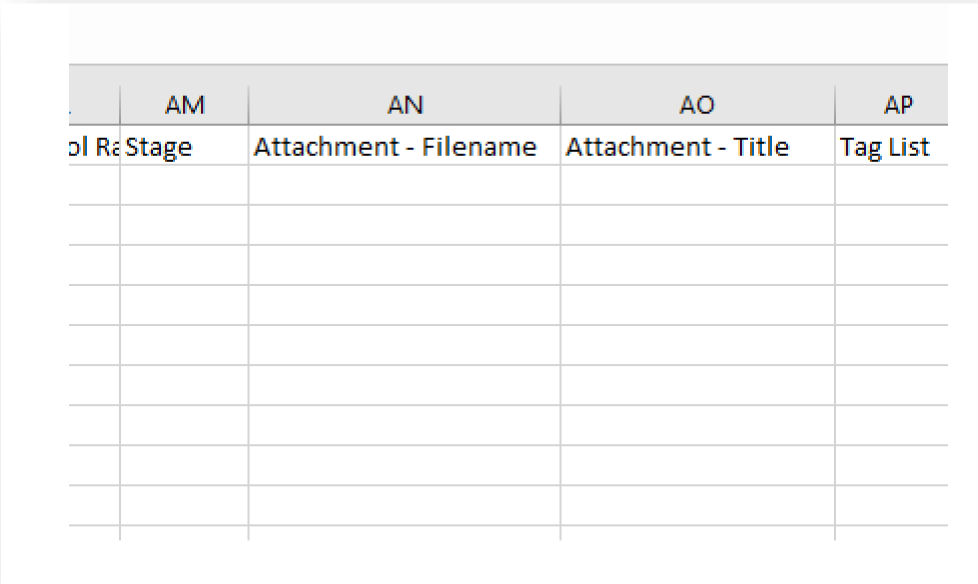


On the next screen, you will see any attachments that have been uploaded here and are waiting to be attached to the right Register and Form. To upload your own attachments, select +Upload and add the fields you want:

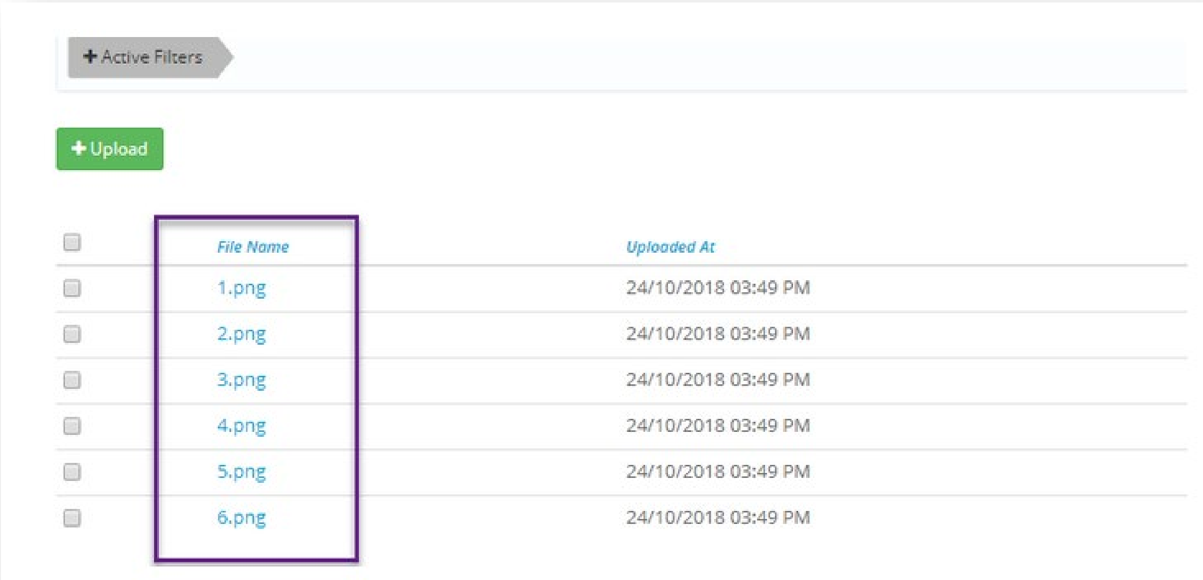


Note that if these files are not attached to a Register and Form within 30 days, they will be deleted.

The attaching of the file to the correct Register and Form is done through the Registers and Forms import process. At the end of the import file there are two columns labelled 'Filename' and 'Attachment Title':

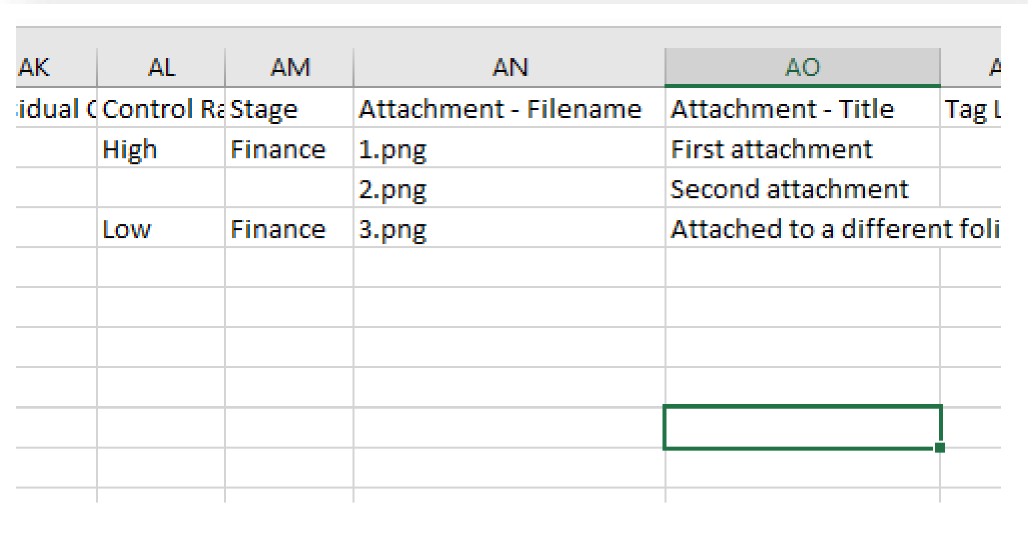


These can be used to attach the files that you previously uploaded to the correct Register and Form. The Filename needs to match the filename that the attachment has in Assurance:



	File Name	Uploaded At
	1.png	24/10/2018 03:49 PM
	2.png	24/10/2018 03:49 PM
	3.png	24/10/2018 03:49 PM
	4.png	24/10/2018 03:49 PM
	5.png	24/10/2018 03:49 PM
	6.png	24/10/2018 03:49 PM

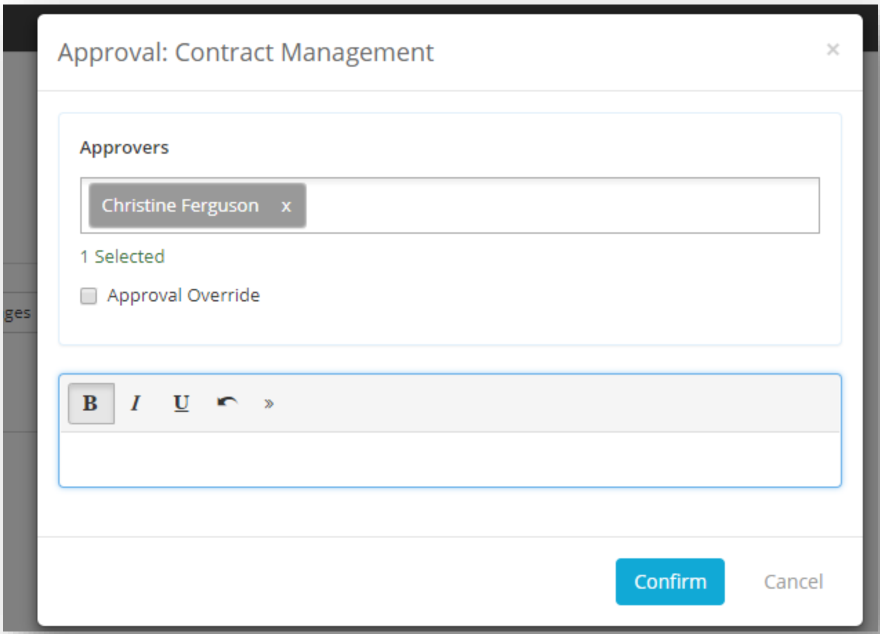
The Title can be whatever you want. **Note:** when attaching files to a particular Register and Form entry using the import function it follows the same rules as tables. That is, each attachment goes on its own row in the import file.



AK	AL	AM	AN	AO	A
idual (	Control Ra	Stage	Attachment - Filename	Attachment - Title	Tag L
	High	Finance	1.png	First attachment	
			2.png	Second attachment	
	Low	Finance	3.png	Attached to a different foli	

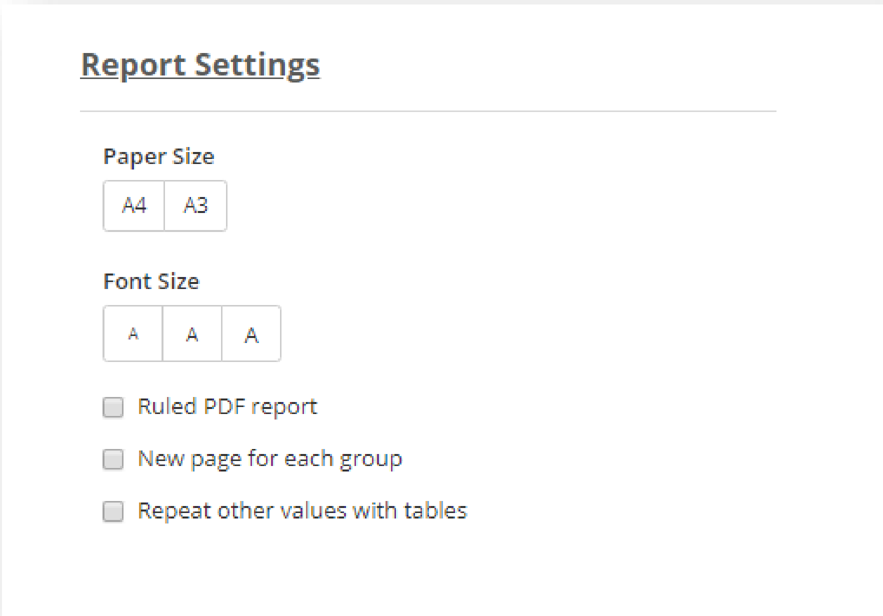
Ability to Add Comment when Submitting for Approval

When submitting a Register and Form entry for approval we have added the ability for the submitter to add a comment on the Register and Form entry in the form of a Note:



New Report Settings

We have added more functionality to the Report Settings in Assurance. This includes changing the font size, ruled PDF reports, and the ability in a grouped report to have each new group on a separate page:



Report Improvements

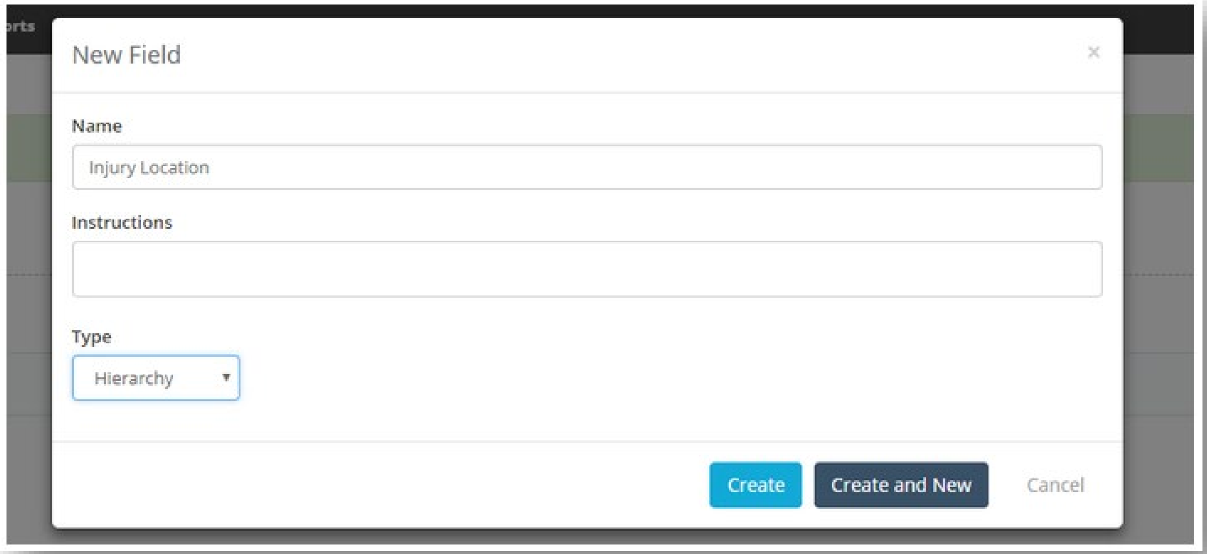
We have added several improvements to reports in this release, including:

- Adding the ability to filter Registers and Forms reports by the 'Closed At' date.
- Including the Person Responsible's Job Title as a field in Registers and Forms reports.
- In Risk Reports if there is only one Risk Matrix, we have increased its size so that it occupies more of the page.

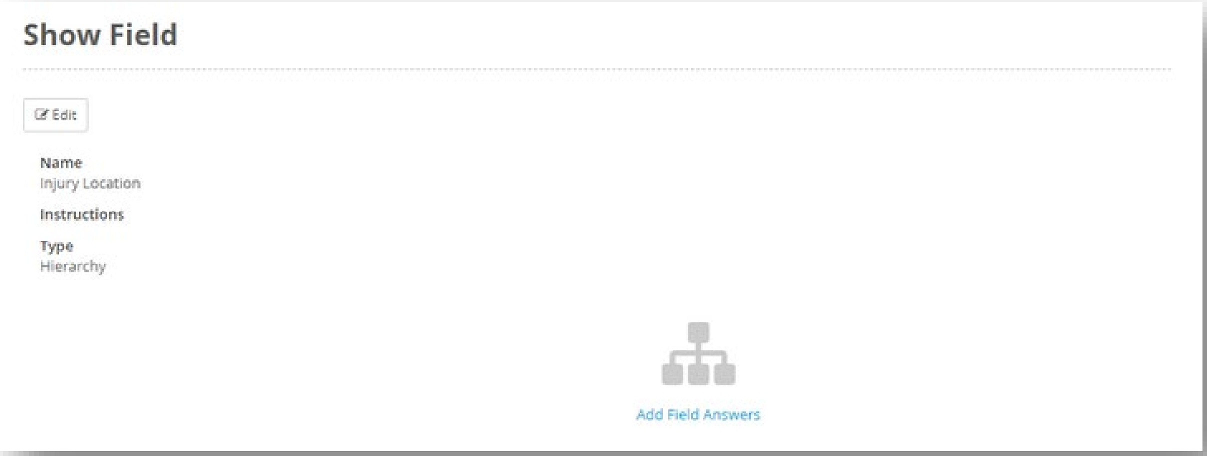
New Field Types

- **Hierarchy Field**

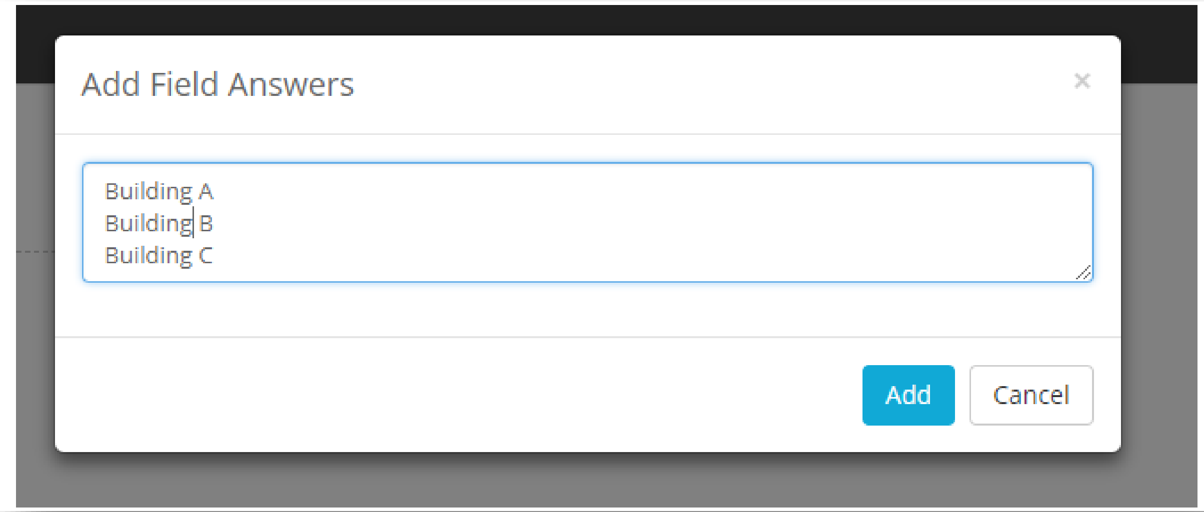
Hierarchy fields are used to set up the possible responses in a tree structure. The field is created the same as any other, but you cannot set up the responses when creating the field like you can with Single and Multi-Select fields



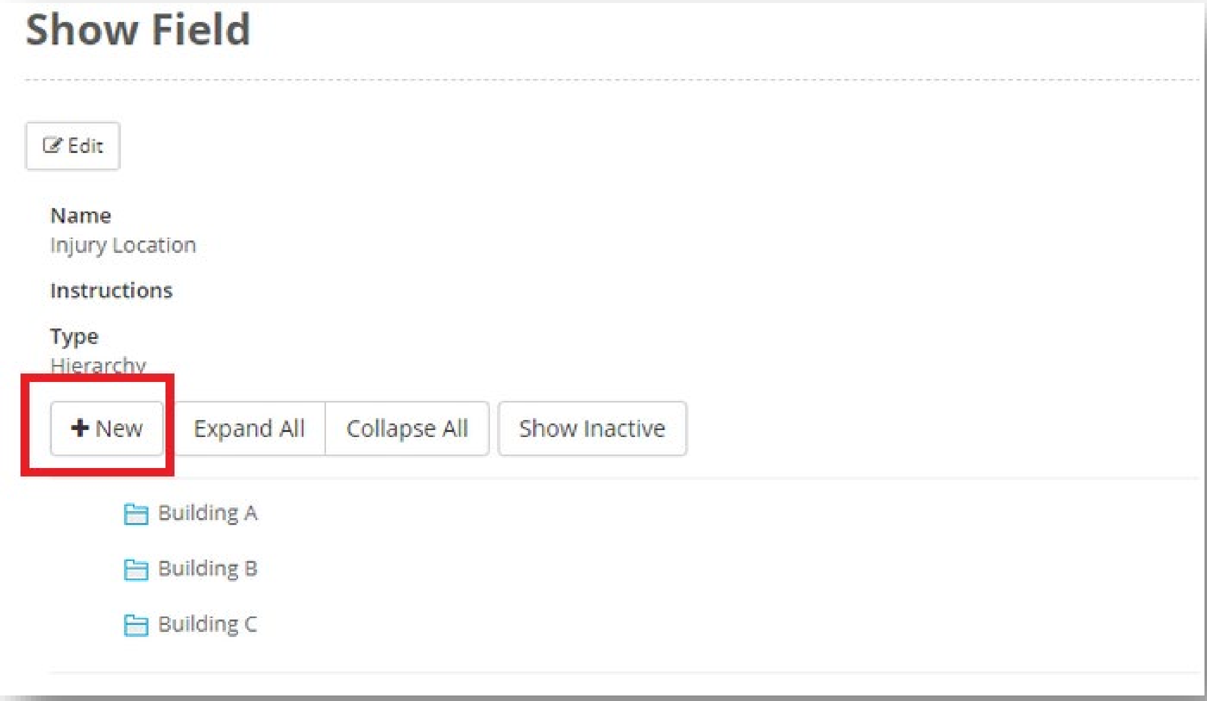
Click Create to create the field, then click on the newly created field wherever you have created it (i.e on the Register and Form Template Fields tab or in the Field Library) to be taken to the details page for this field:



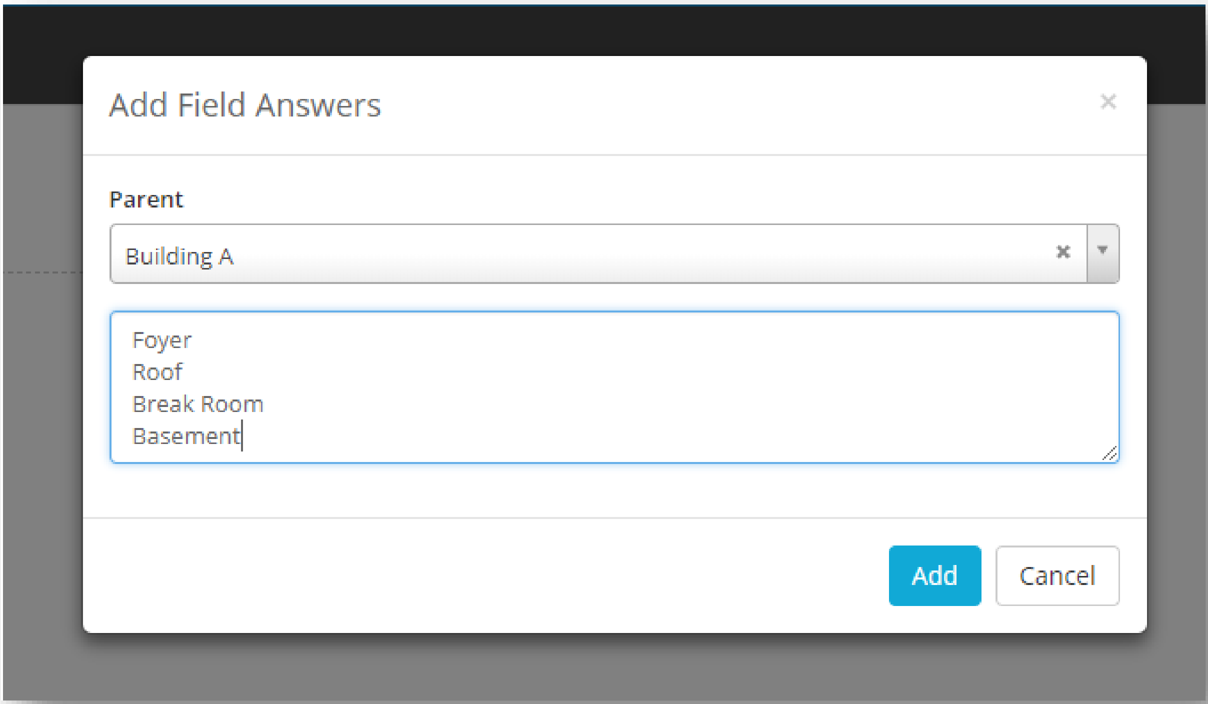
On this page you will see a link saying Add Field Answers if none have been set up previously. Click on this to make a popup appear where you can start adding answers. This popup asks you to add only top-level answers as a starting point. When you have put in the top-level answers click Add:



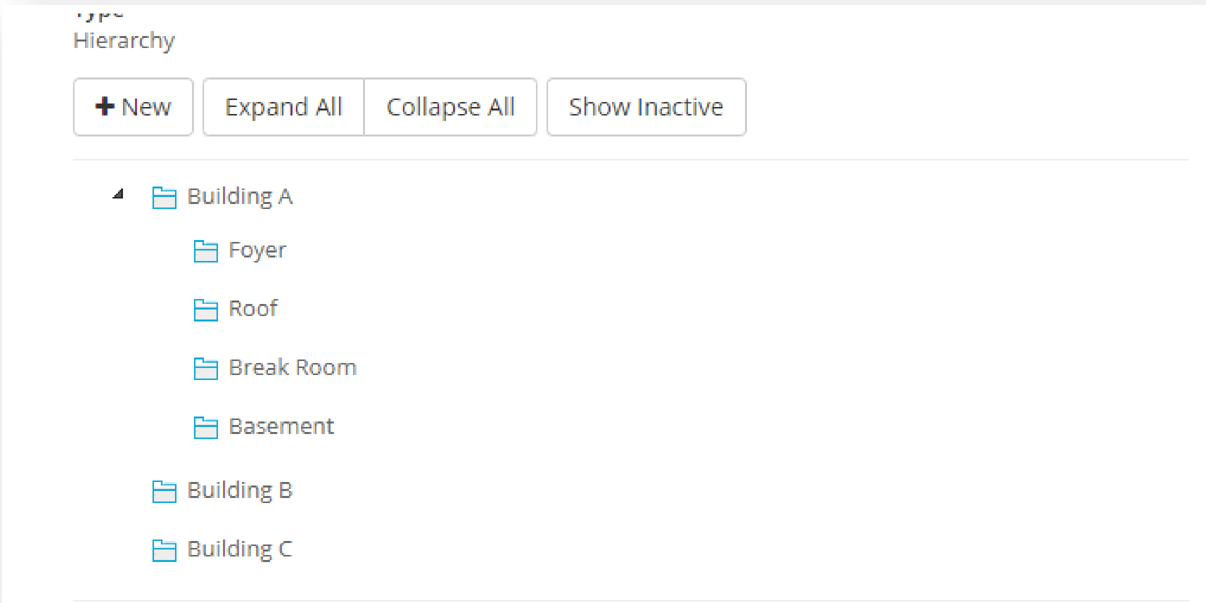
You will then see the fields added, with several options above them. To start adding more fields into the hierarchy click +New:



After clicking +New you will see a popup asking for a parent response, then a list of children under that parent, with each child on a new line:



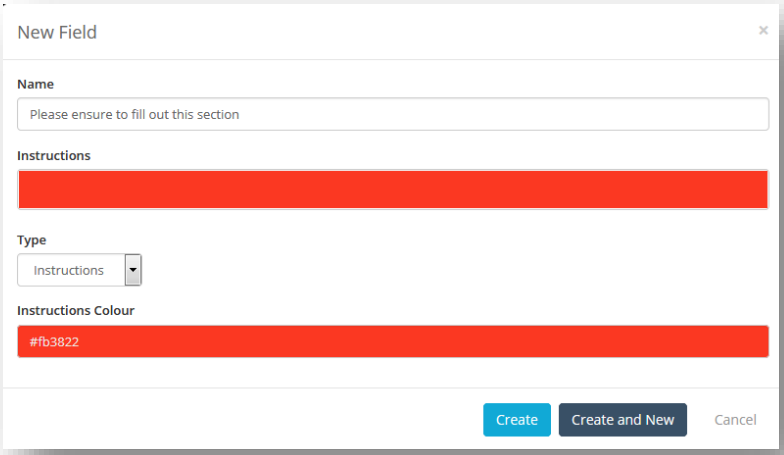
When you have finished with the children for that particular response, click Add. You will then see those answers reflected in the hierarchy:



You then repeat this process by clicking on +New again until you have the entire hierarchy for this field set up.

- **Instruction Field**

We have added a new field type called an Instruction field. This field type allows you to place instructions anywhere on your Register and Form template, which will be visible in both View Mode and Edit Mode:

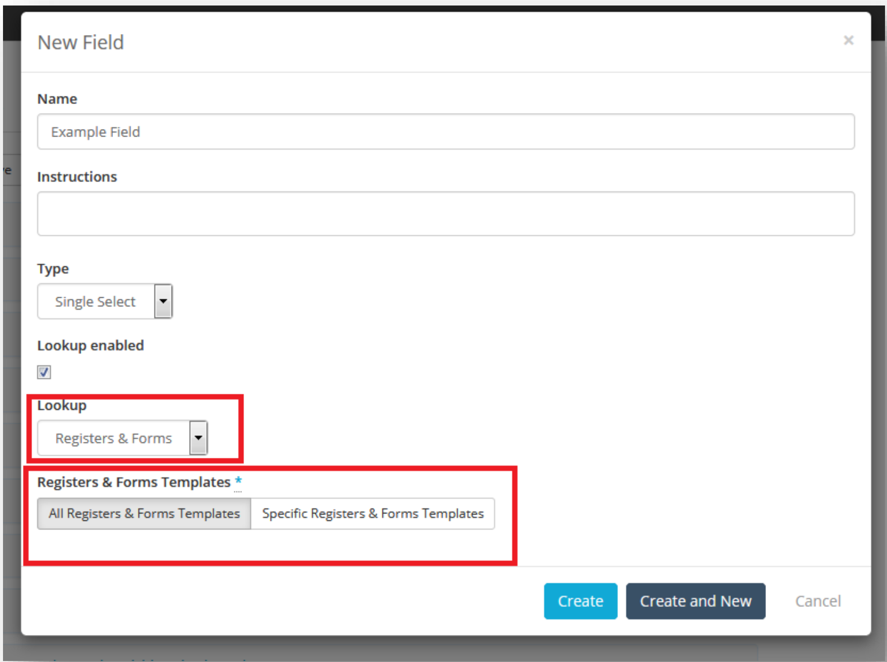


- **Email Field**

We have also added an email type field, which you can use when you want the user to enter an email address. This field forces the answer to be in an email format e.g. something@example.com.

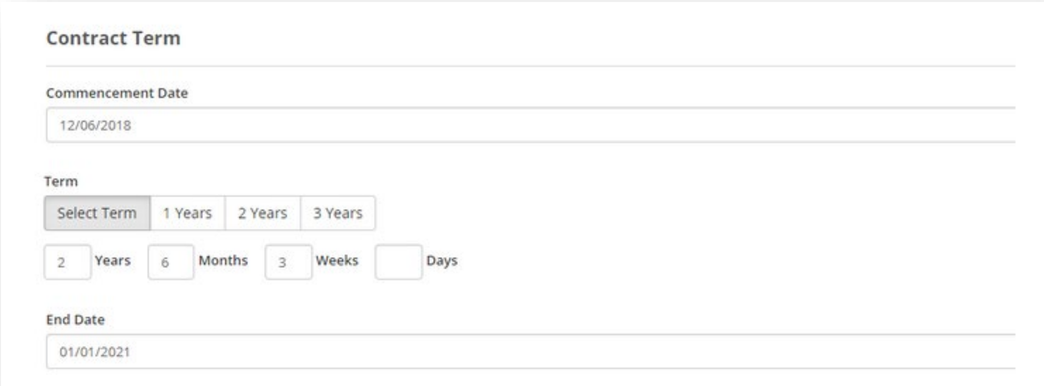
- **Ability to select Registers and Forms in Single & Multi Selects**

When creating a Single or Multi Select and setting it up as a lookup field, we have added the list of Registers and Forms in your instance as a new option:



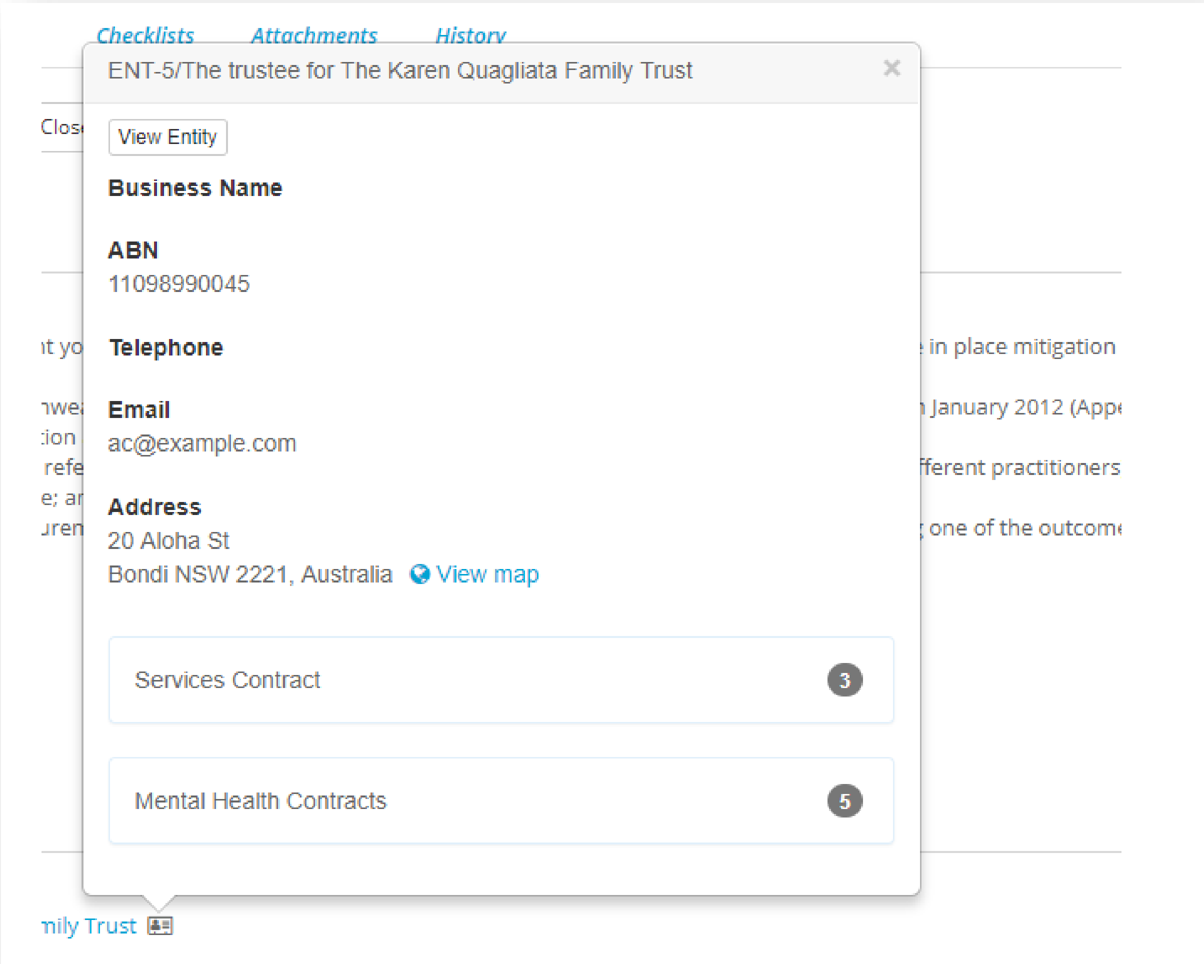
New Term Breakdown

We have made improvements to the inbuilt term field, and added the ability for it to select years, months, weeks or days:



Entity Popup UI Enhancements

In our last release we added the concept of Entity Preview Cards that can be used to see an overview of an entity's details from the Register and Form entry, without the need to go the actual Details page for that entity. In this release we have made some improvements to the cards' UI, to make them more readable and intuitive:

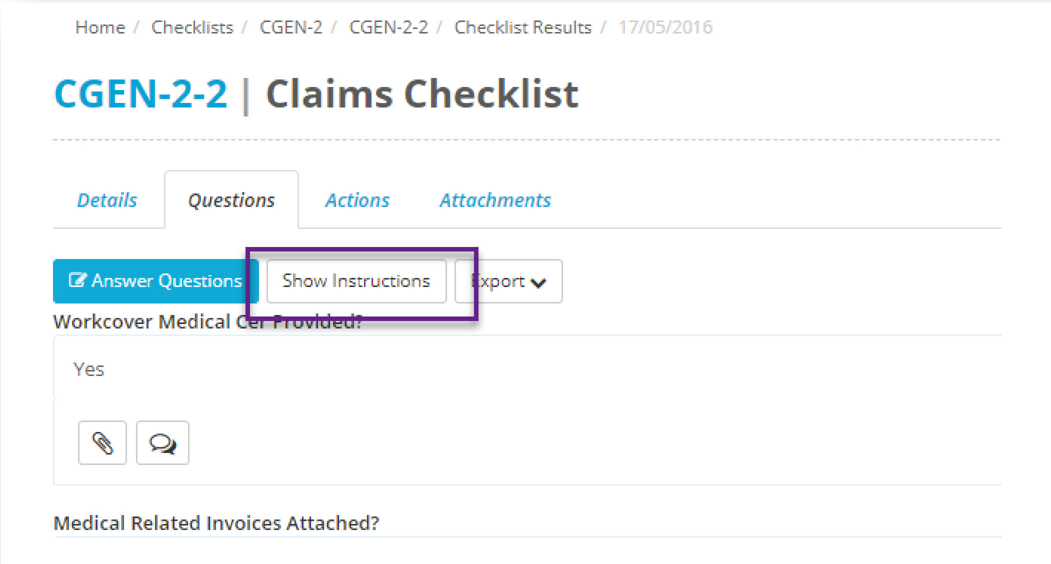


Location Field Length 255

We have increased the character length for Locations in Assurance to 255, up from 40 characters. This puts them on par with other Short Text fields.

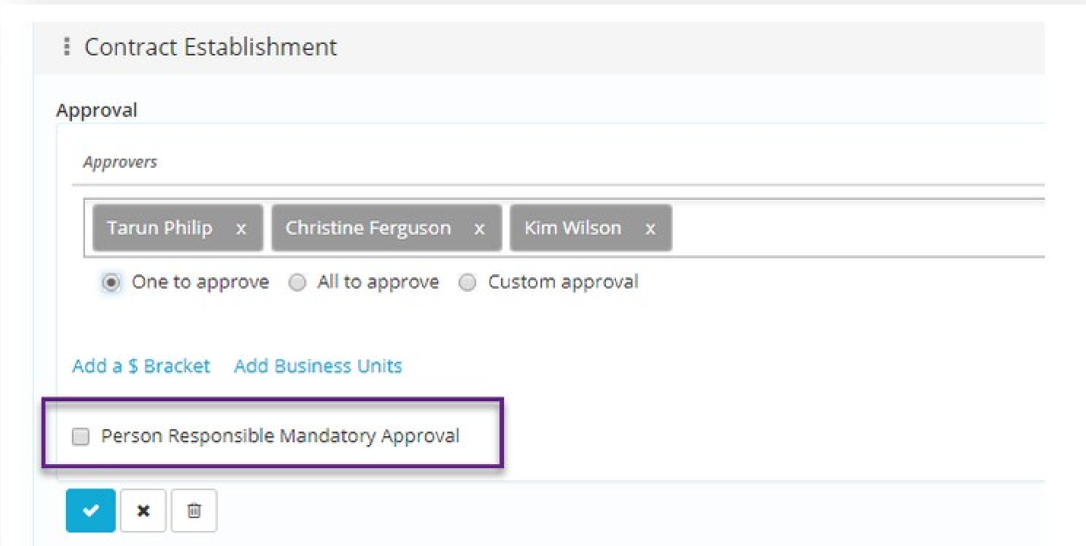
View Checklist Instructions in View Mode

Instructions on a checklist can now be seen in view mode when looking at the checklist results. Previously these instructions were only seen when answering the checklist. The instructions are also available when exporting the checklist to a PDF:



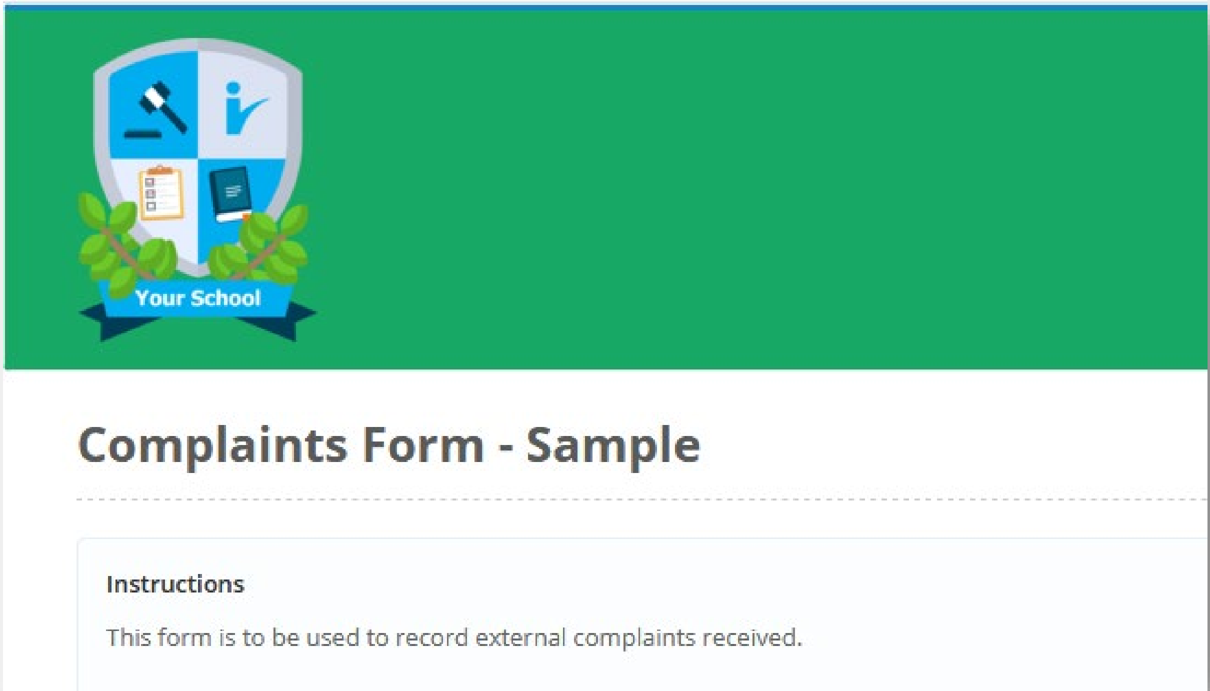
Person Responsible is the Approver of a Register and Form Stage

When setting up the approval workflow of a Register and Form Template we have added the ability to make the Person Responsible the approver for a stage. This means that when the form is submitted for approval, whoever the Person Responsible is at that time becomes one of the approvers for that form:



Set Colours to Public Link and Launchpads

You can now add custom colours to your Public Links and Launchpads. This colour is represented on the top and bottom borders of the screen when the user accesses the Public Link or Launchpad:



Review Details Now Hidden from Lite Users

The progress of a checklist review can now be hidden from Lite Users. When they check the results of checklists, they have submitted they will not see how it has moved through its review stages: