Release 240 February 2019: User interface changes, easier navigation, administration improvements and more
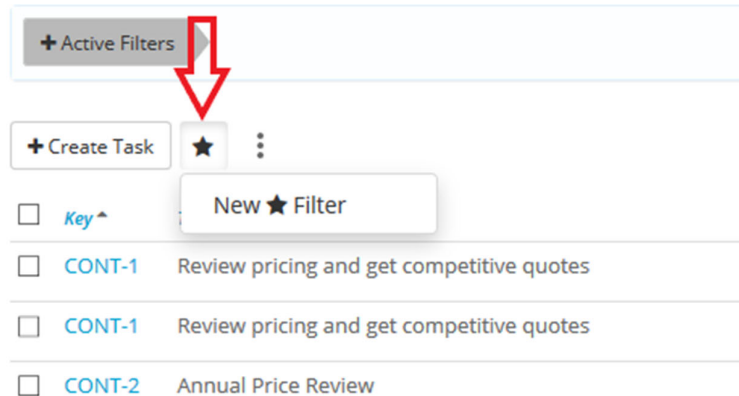
User Interface Improvements

When you access any list or register view screen in Assurance you will see a cleaner user interface.

All starred filters and the ability to create a new star filter have been placed in the 'Star' button.

The 'Ellipses' button combines the Export to PDF, Export to Spreadsheet, Configure Columns and MergeDocs.

The 'Tools' button contains bulk action tools.
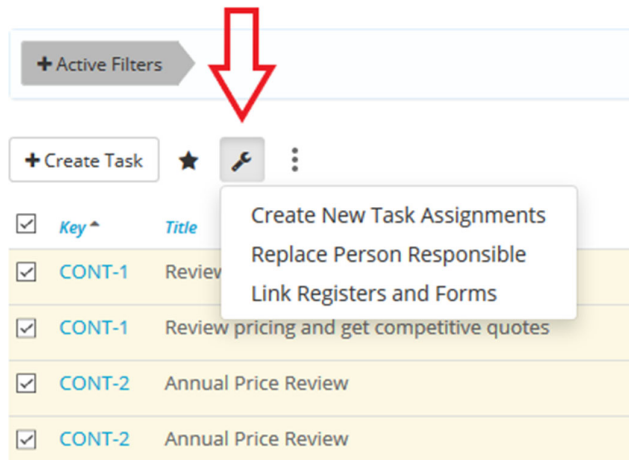
Changes have also been made to buttons on individual instances of Registers and Forms view. When viewing a logged Register and Form you will now see three buttons at the top:

INC-4 | Example Register and Form

Details *Tasks* *Checklists* *Attachments* *History*

1 2 3

Details

Submitter Email
shayan.khoshab@complispace.com.au

Details of Incident

Location of Incident

1: Edit the Register and Form

2: View Changes

3: Ellipses: This button includes all other options: Move to Next Stage, Submit for Approval, Send Back to Submitter, Copy, Close, Bookmark and Export to PDF.

Tip: *We have not removed any functionality so if you can't find something, the most likely place is the Ellipses button.*

The 'Go to a section or table' Feature

Another change we have made is the quick navigation to a section or a table on a Register and Form. With this feature, users can navigate to a section of a Register and Form without scrolling. You can also expand a table from the top of the Register and Form.

HVSC-1 | Contract for Electrical Services

Details *Credentials* *Tasks* *Checklists* *Attachments* *History*

Details

Contract Description
Provision of Electrical Services for the school

Department
Yarra Valley Water

Were Standard Terms Accepted?

Description of Undertaking
Empty

Go to a section or table

Details	
Third Party Details	
Contract Term	
Contract Obligations	
Supplier Obligations	Expand
Federal Group Obligations	Expand
Contract Value	
Negotiations	

User Cards

In our last Assurance release we introduced Avatars, in this release we have added a User Card to the Avatars. By clicking on any user's avatar, you will see more information about that user.

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Search for Person Responsible by Email Address or Job Title Not Just by Name

When adding a Person Responsible to a Register and Form, Task Assignment or Checklist Assignment, you can now search for the person by their email address or job title in addition to searching by their name.

Read Only Fields

There may be cases when you need to lock down values in particular fields on a Register and Form to prevent users from editing these fields in certain stages. An example of this could be locking down the values originally provided by the incident reporter.

A new visibility option called 'Read-Only' has been added to the existing Optional, Mandatory and Hidden options. Fields can be made Read-Only in a particular stage/s.

Details   **Fields**   Notifications   MergeDocs   Reference Documents   Recommended Tasks   Recommended Checklists   Public Link   History

‹ Back

	Incident Report	Incident Management	Incident Review
Key ✳			
Title ✳	Mandatory	Mandatory	Mandatory
Details of Incident			
Location of Incident	Optional	Read Only	Optional
Date that incident occurred	Optional	Read Only	Optional
Time that incident occurred	Optional	Optional	Optional
What happened?	Optional ▾	Read Only	Read Only
	Optional		
	Mandatory		
Immediate Action Taken	Hidden	Optional	Optional
	Read Only ⟵		
Witnesses			
Were there any witnesses to the Incident?	Optional	Optional	Optional
Witness Details			
Witness Name	Optional	Optional	Optional

A field that is Read-Only in a stage will be visible, but not editable in that stage even if a user has edit rights. To edit the field, the Register and Form must be moved back to a stage where the field is editable. The Register and Form will then need to be progressed through the approval stages back to its current stage.

INC-8 | Incident Form

Details   Tasks   Checklists   Attachments   History

✎   ◷   ⋮

Details

Submitter Email
shayan.khoshab@complispace.com.au

Details of Incident

**Location of Incident**
123 Fake Street

Date that incident occurred
05/02/2019 ⊘ ⟵

Time that incident occurred
09:05 AM

**What happened?**
John fell down the stairs and broke his leg.

Users Can Delete Attachments on Draft Registers and Forms and Checklists Before They Submit

Users can now delete attachments on a draft Register and Form or a Checklist before submission.

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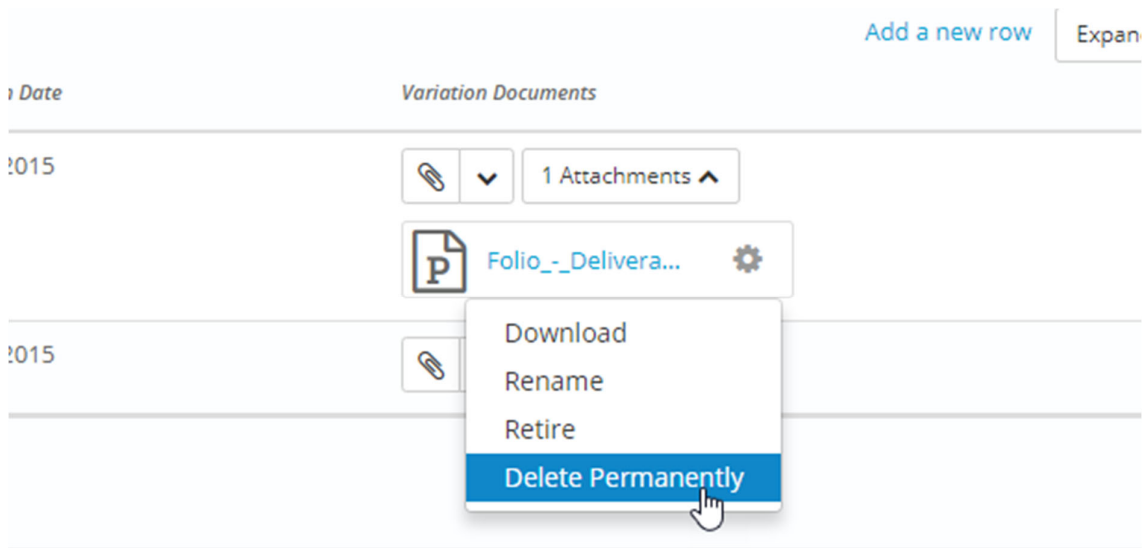
Ability to Filter by 'Updated at' Field of Registers and Forms

This release includes the ability to filter Register and Form list screens and Reports by the Updated At field, which is the date that the Register and Form was last updated:
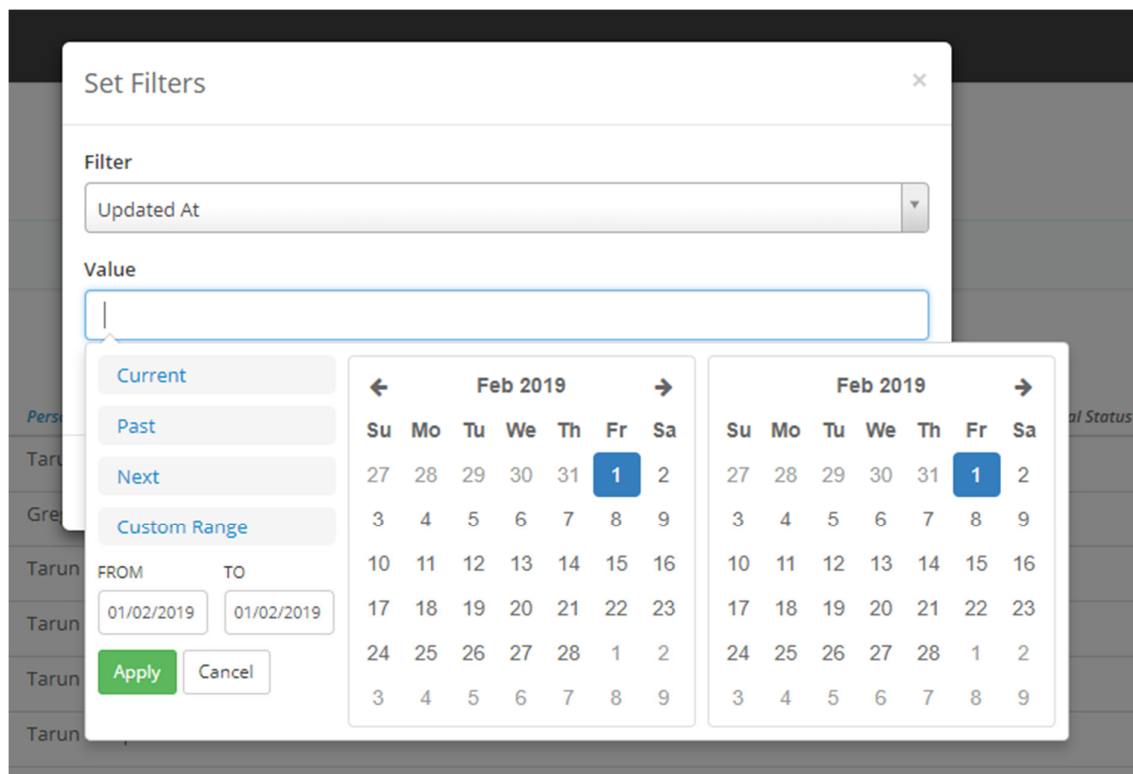
Approval Workflow Features

Chain of approvers

Assurance requires a user to click 'Submit for Approval' to send an approval request to Register and Form approvers in subsequent stages. Registers and Forms can now be set up to move through the approval workflow automatically without an approver having to click 'Submit for Approval', removing the need for a two-step process.

To enable this feature, an Administrator will need to tick 'Automatically submit for approval when the Register and Form enters this stage' on each stage of a Register and Form template.
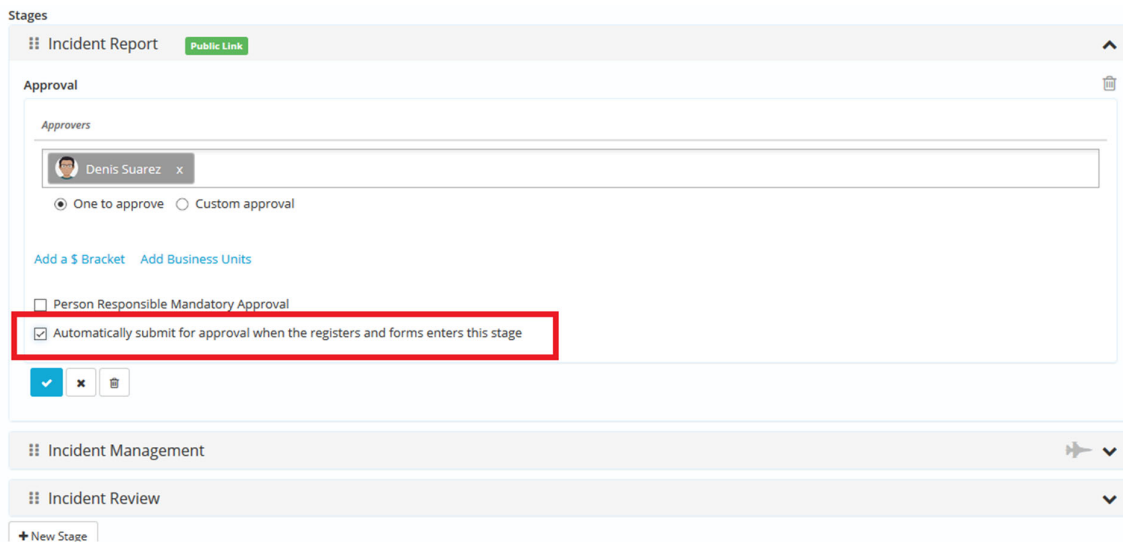
Send back to submitter – Expanded

The 'Send back to Submitter' feature was only available to the approvers on the first stage of the workflow of a Register and Form logged via a public link. This feature has been expanded so that a Register and Form can be sent back to its submitter from any stage in the workflow.

If the Register and Form is sent back to its submitter it will be moved back to the first stage of the workflow before being sent back to the submitter. The submitter only sees the fields that are exposed to them in the workflow. The Register and Form instance will be read-only while the submitter makes their edits and resubmits.

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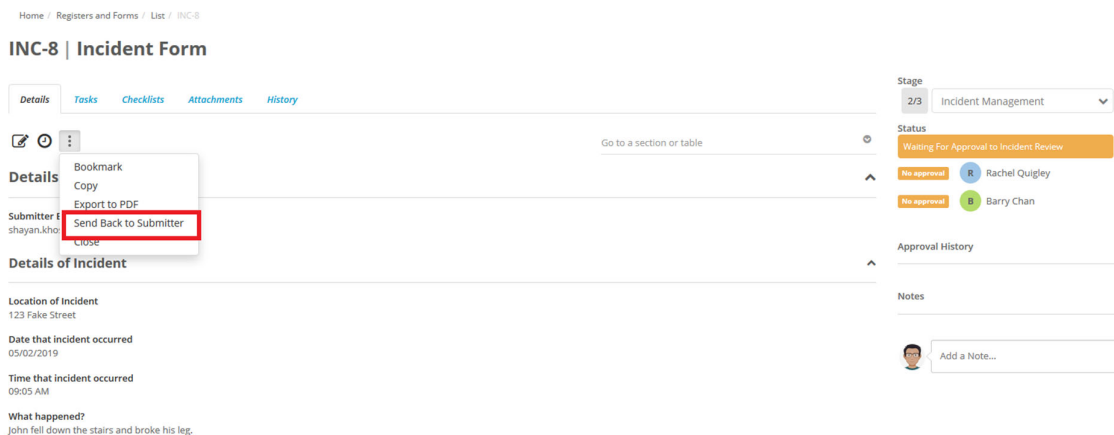
Notifications Improvements

Send custom notifications to the Person Responsible for a Register and Form, the creator of the Register and Form or the Submitter of a Public Link.

You can now choose to notify the Creator/Public Link Submitter and/or Person Responsible for a Register and Form using the Custom Notification feature:

Batching custom notifications

If you are getting too many custom notifications in a day they can be batched into an overnight email.

Custom notifications in the notifications bell and bookmarking custom notifications

In addition to email, custom notifications will also appear in a user's notification bell. The notifications will stay in the bell for 30 days before they expire. They can be also be bookmarked, which will add them to the Bookmarks Snapshot on the homepage and keep them in the bell until the bookmark is removed.
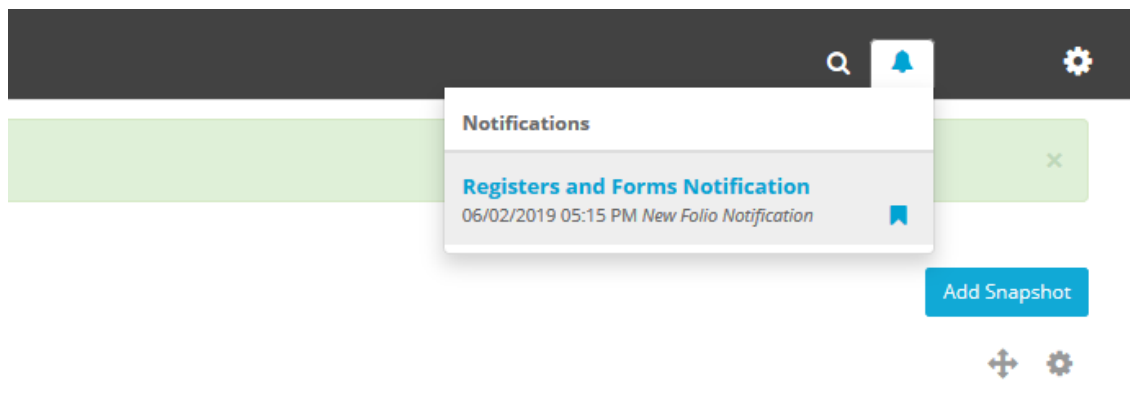
Administration Improvements

Streamlined user retirement

In this release we have simplified the process for retiring users by allowing you to reassign their responsibilities when you click Retire:
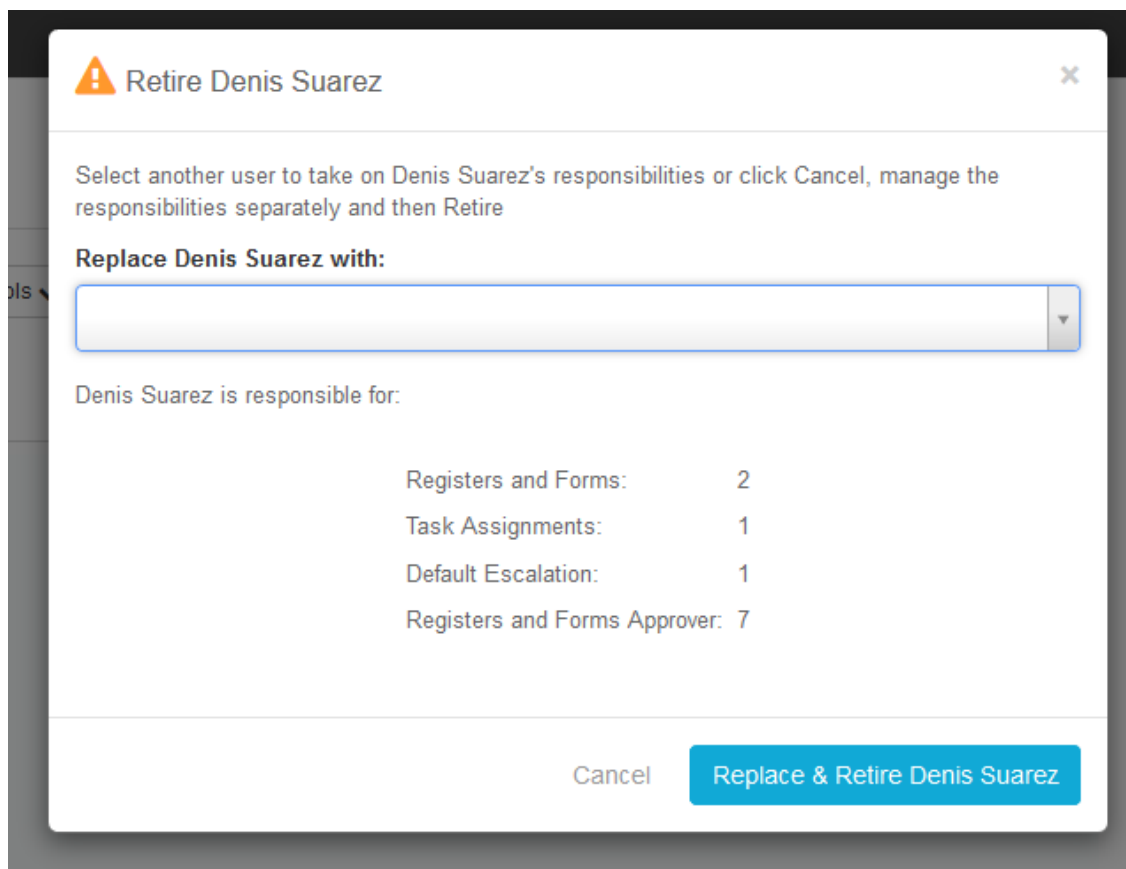
PLEASE NOTE: when a user leaves your organisation and is to be replaced by another user, you **should NOT** simply edit the departing user's details – this will affect the audit trail on the system. The correct process to follow is using the steps below:
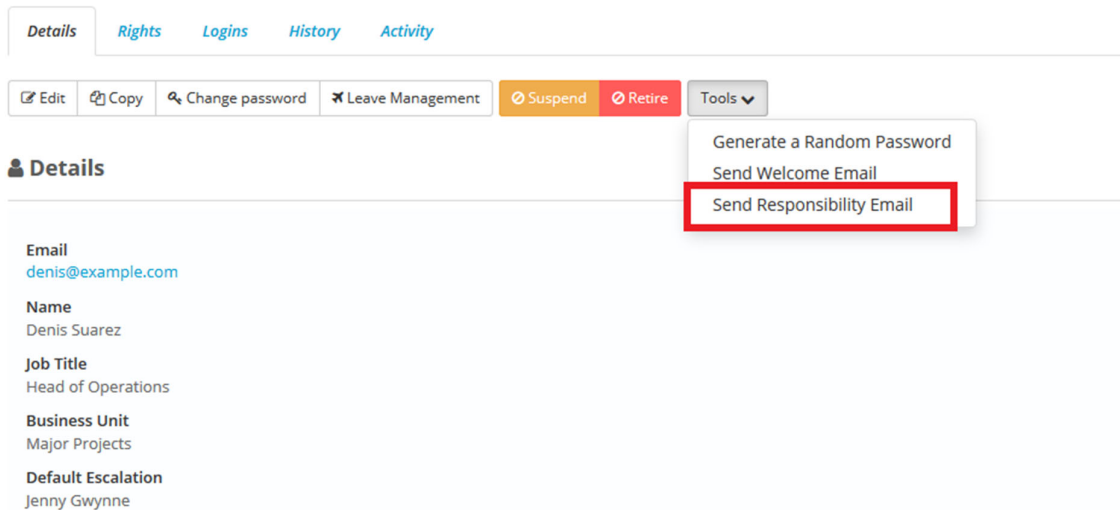
1. Create the new user and assign relevant access rights
2. Retire and re-assign responsibility from the departing user to the newly created user as shown in the above screenshot.

If you require further assistance or information on replacing users on Assurance, please get in touch with CompliSpace Helpdsek or the relevant CompliSpace staff member.

The New Responsibilities Email

You can now send a user an email of their responsibilities on Assurance by clicking on Tools and then Send responsibility email. The responsibility email is also sent if a user's email address is changed.

Default Escalation Users

This releases expands on the escalation user feature to include the concept of Default Escalation Users. These are escalation users that can be set up for each user (e.g. their manager) and this can be done when setting up a user or editing an existing user on Assurance:

Escalation Users are users that a Task or Checklist is escalated to in the event that the Person Responsible does not complete the item by a certain date. Every user in Assurance can have a set of Default Escalation Users that can be selected when assigning them an Task/Checklist:

Assignment Settings ^

Comments Required

[   ]

Evidence Required

[   ]

Escalation

- ☑ Default Escalation
- ☐ Registers and Forms Person Responsible
- ☐ Designated Escalation User

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