Release 250, May 2019: New Filters, Registers and Forms Trend Charting, Bulk Retire Tasks/Checklists

New Filter Interface

Assurance now dynamically gives you filters based on the fields that you have selected on the Registers and Forms template making filtering quicker and easier than before. You can still add filters that are not being used as columns in the view.

Lite User Portal

We have been moving towards the concept of a portal for lite users. In the Lite User portal:

- ✓ Team Leaders can manage their entity and any associated contacts
- ✓ Credential Requests will now appear in Lite Users To Do Lists

The Lite User Portal needs to be enabled through the Lite User Settings page as shown below:
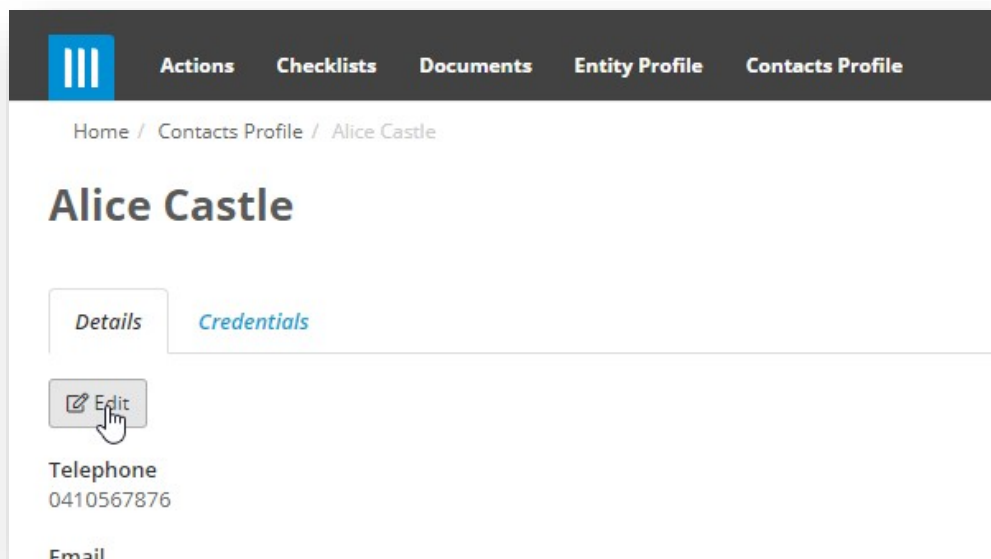
Lite User Team Leaders can manage their entity and any associated contacts

Lite Users who are Team Leaders can manage their entity and contacts. They can edit entity and contact details, but they cannot add new contacts.

They will also be able to view all the credentials that they have submitted.

Credential Requests will now appear in Lite User To Do Lists

As part of the Lite User portal, credential requests will now appear in Lite User's To Do List.:

## Ability to Export/Import Registers and Forms Templates

This feature lets you export a Registers and Forms Template out of one Assurance instance, and then import it back in to another instance (Sandbox to Production). This means that if you have a template that you have been working on in the Sandbox, you can now import this template into your Production instance directly instead of building the template up from scratch:
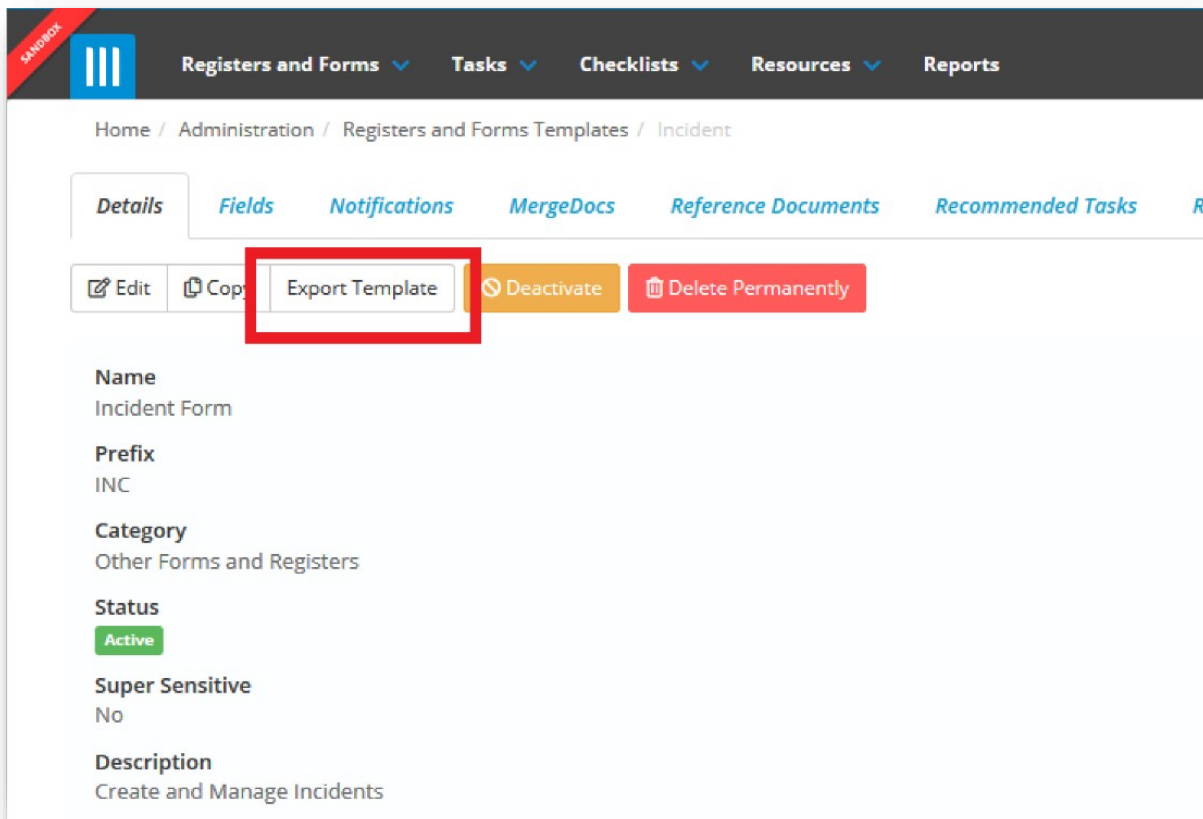
The 'Export Template' button, shown in the above image, will export the template as a *.json file to your computer. **You do not need to edit this file.** To import a template, go to the Registers and Forms Template list screen and select +Create Registers and Forms Template:
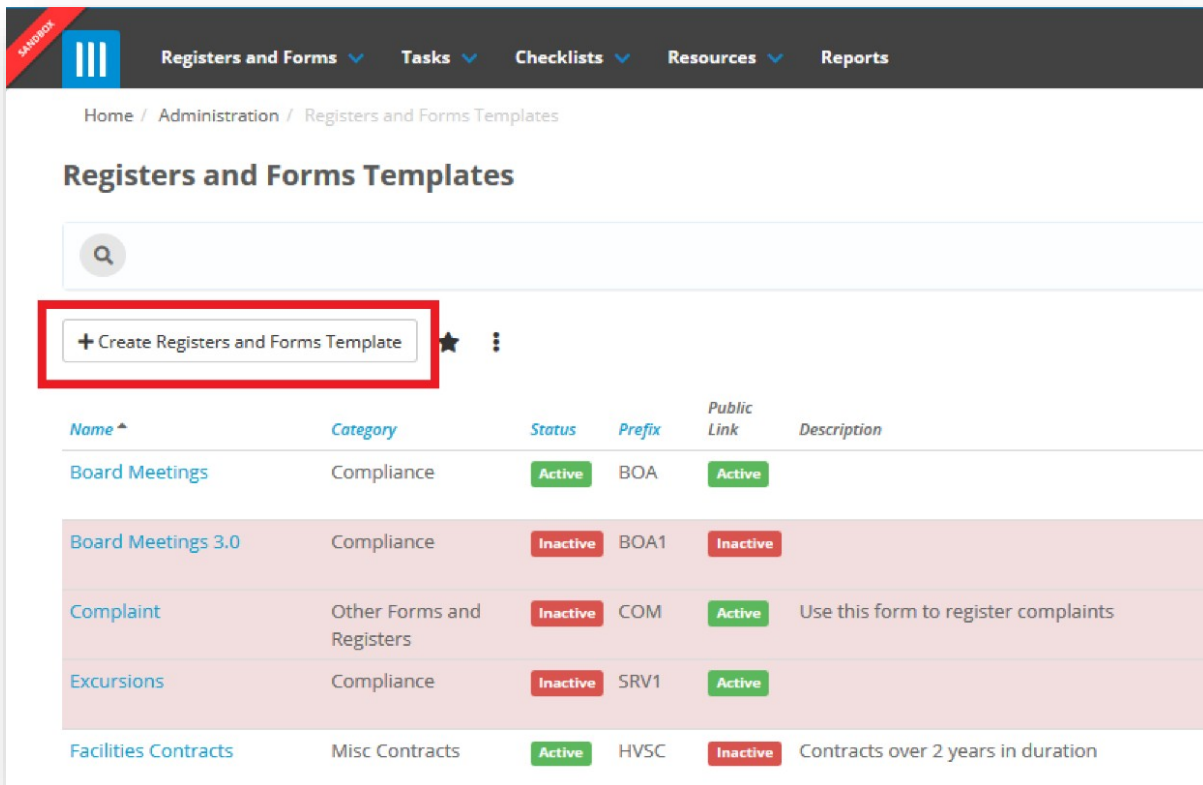
In the pop-up box that appears, click 'Import Template':
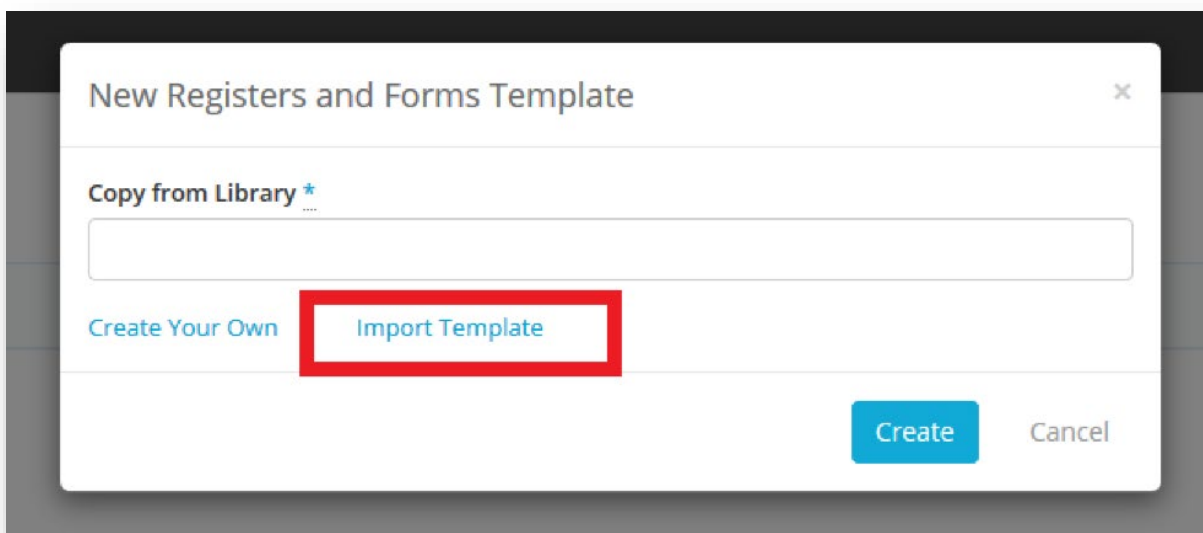
Then upload the *.json file that you previously exported and saved to your computer:
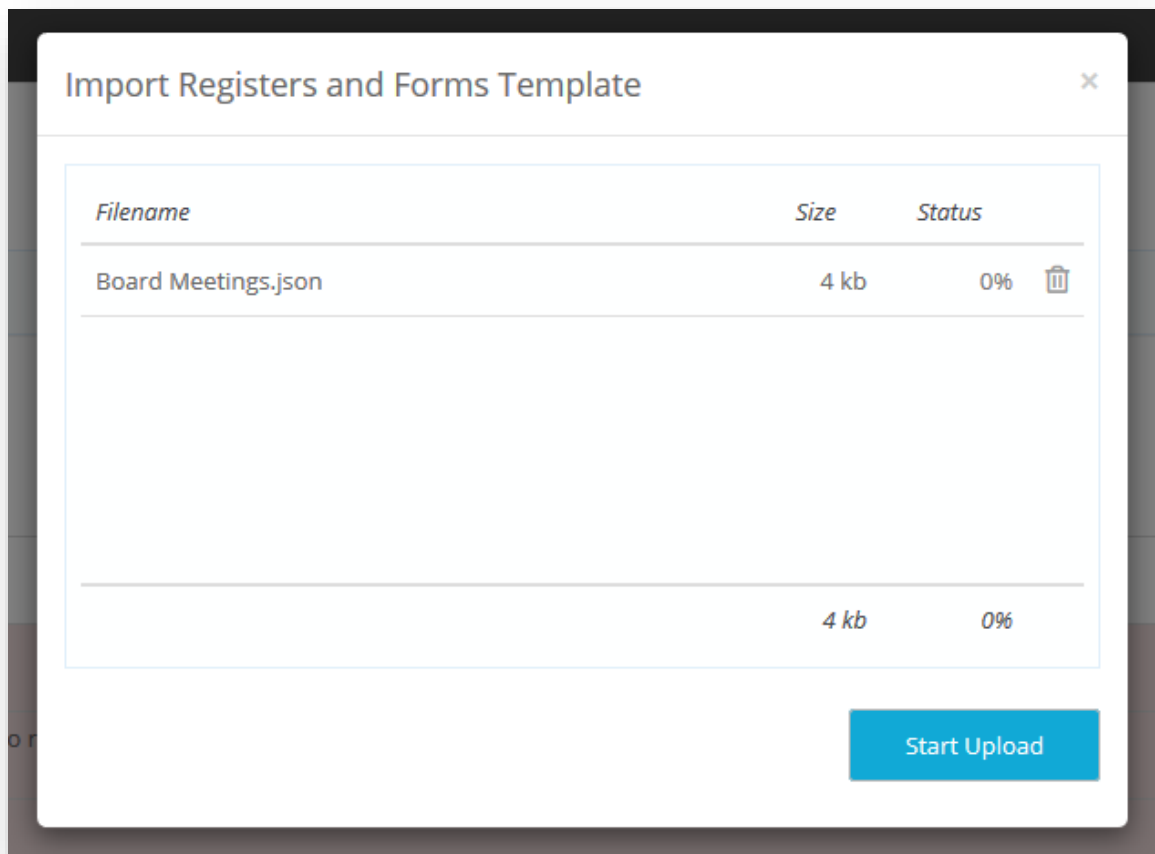
There may be some errors when you try to upload the Template. The most common errors are:

- ✓ **Name has been taken.** This happens if there is already a template with the same name in your Assurance site. To fix this, change the name of the template and re-export it.
- ✓ **Prefix has been taken.** This happens if there is already a template with the same prefix in your Assurance site. To fix this, change the prefix on the template and re-export it.
- ✓ **Field exists with different parameters.** This occurs if you have a field in the new template that has the same name as an existing field with the field library of your Assurance site, but a different field type. This is an issue because you cannot have two fields with the same name, and because they are different types the field that you are importing cannot be mapped to the existing field. In this case, change the name of the field.

If there are no errors, or you have resolved any existing errors, then the template will be imported successfully, and you can 'Activate' it to begin using it:
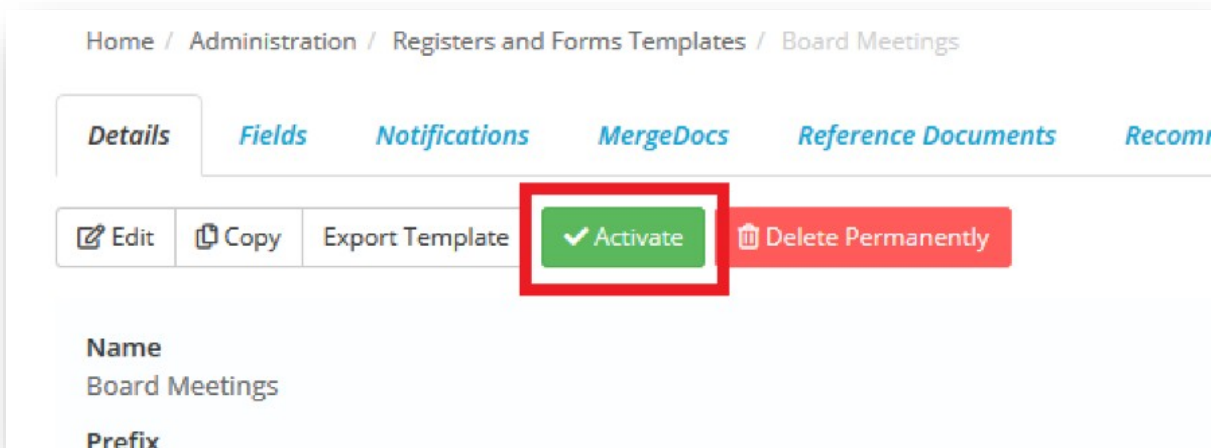
Trend Reporting

We have added a trend chart to the Registers and Forms Report Template. This allows you to see a line or bar chart of Registers and Forms entries created in a selected period, broken down by a given Single-Select, Multi-Select or Hierarchy field:

Trend Based On Folio Created
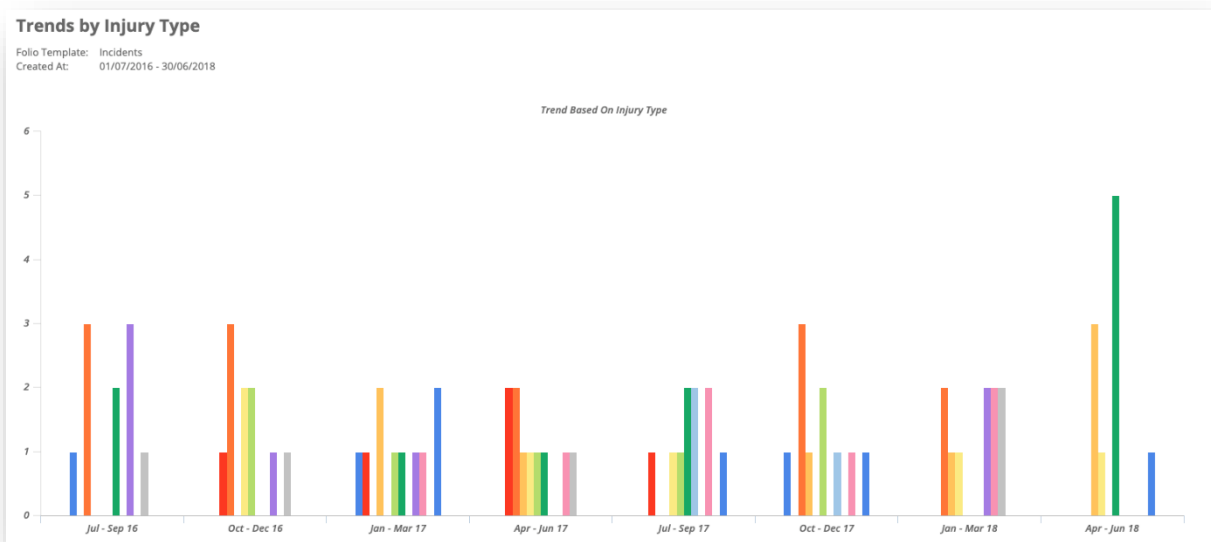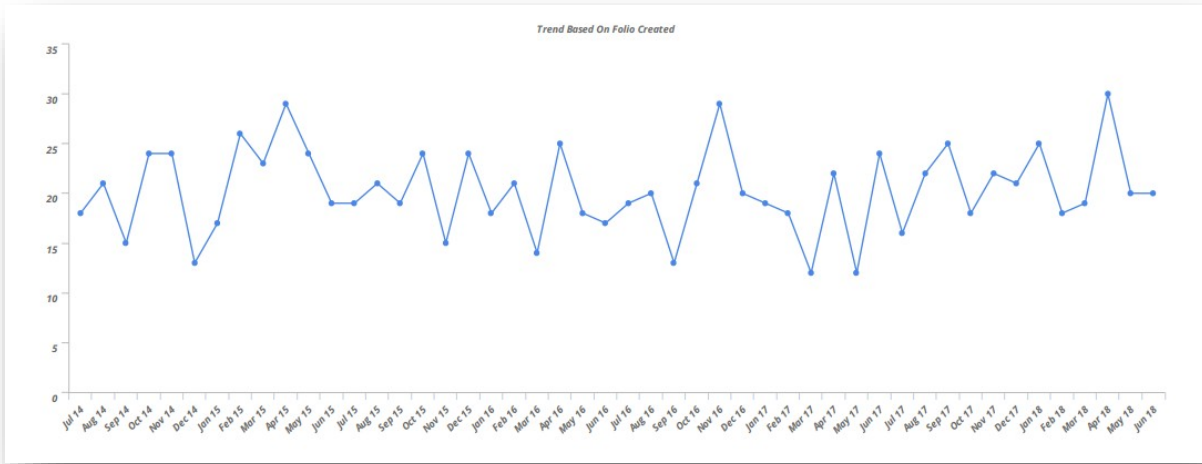
This option can be found within the Registers and Forms Template Report page under 'Summary & Charts':

Linked Registers and Forms Report

Another improvement to reports that we have included in this release is the 'Linked Registers and Forms Report', which can be found in the Built In Reports column on the reports page. This allows you to create a detailed report on entries and their Linked Registers and Forms. The report is split into two sections, one for the Registers and Forms fields and one for the *Linked* Registers and Forms fields:
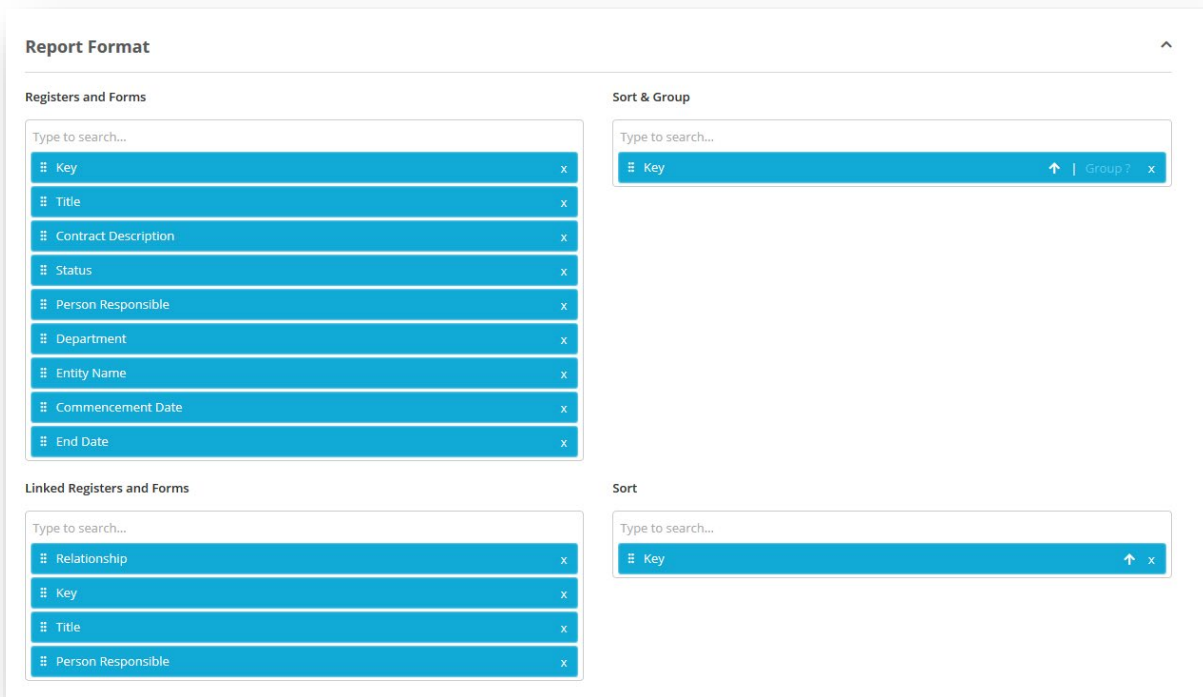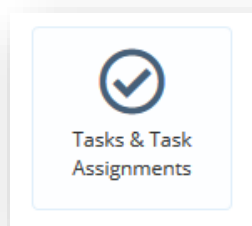

Update Tasks and Task Assignments Through Import

In our last release we added the ability to update existing Registers and Forms in bulk through an import, now we have expanded this to be able to update existing Tasks and Task Assignments the same way. Go to the Admin section of Assurance and select 'Import':
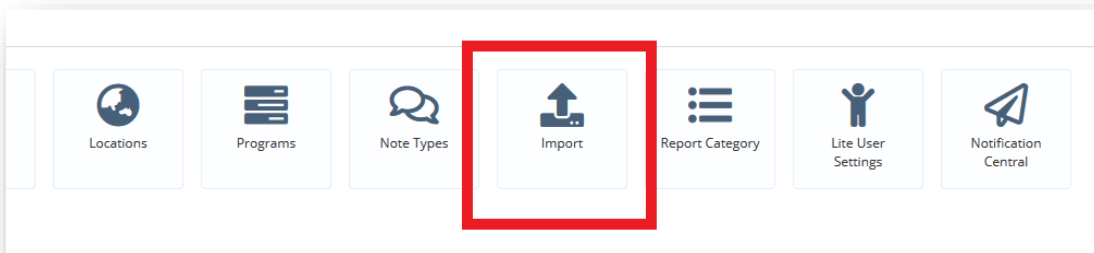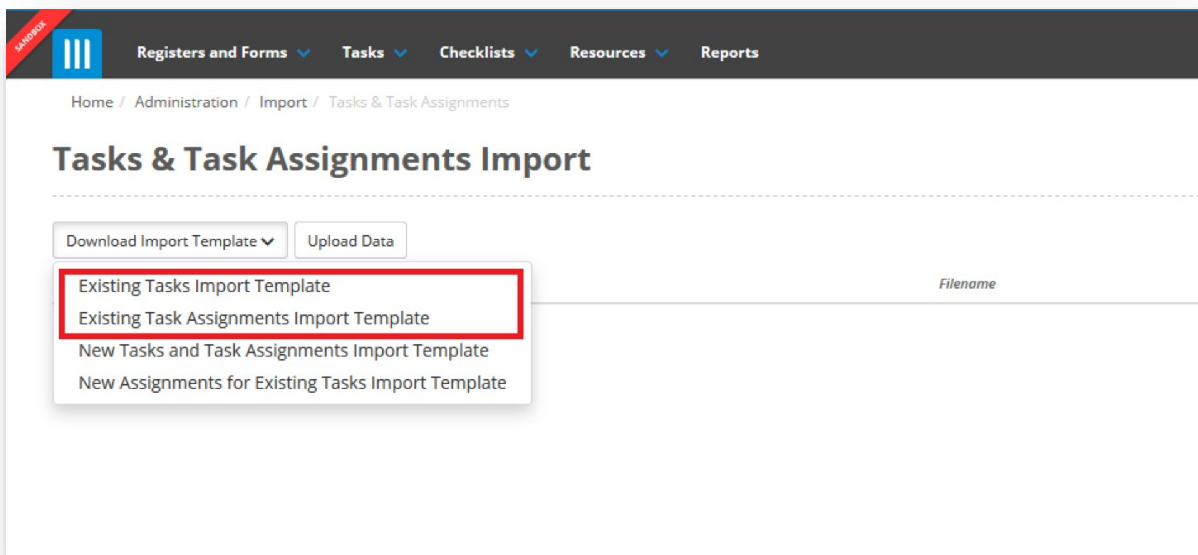

Then select 'Tasks & Task Assignments':

Then click on 'Download Import Template' and select one of the two 'Existing' options:

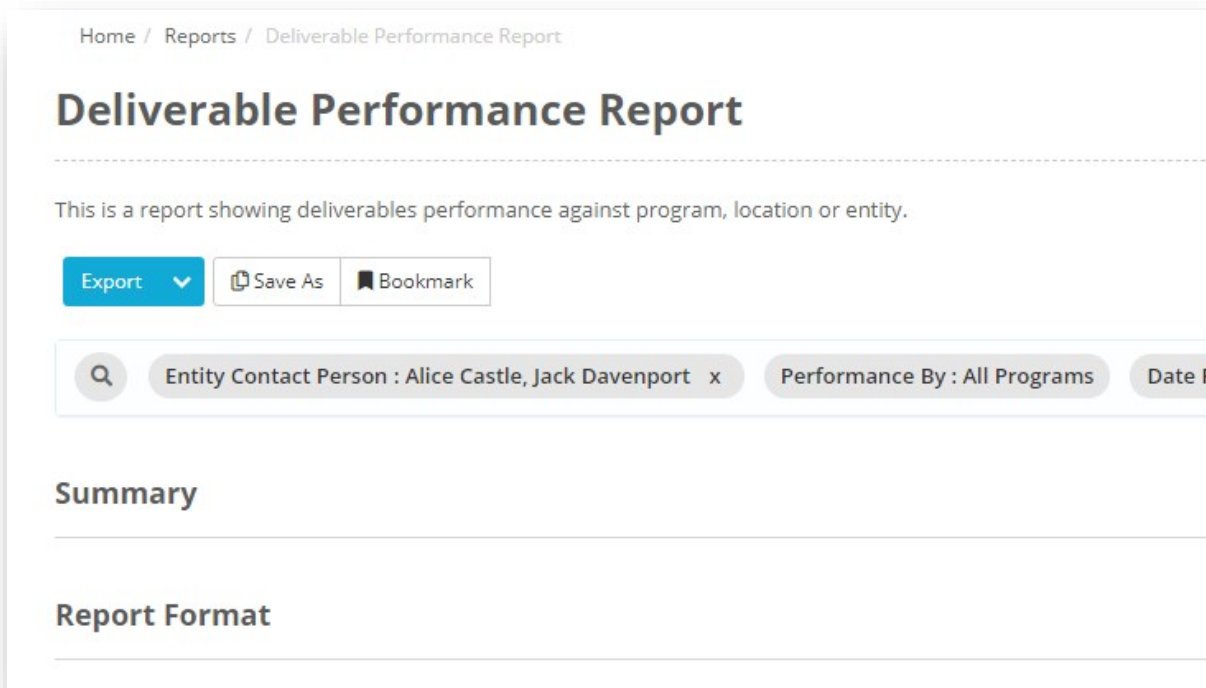## Existing Tasks and Task Assignments Import Templates

Once you choose one of the two templates shown in the screenshot above, a CSV (Excel) document will be created with a column for each of your Task fields. The major difference between this 'existing' template and 'new' import template is that there is an additional, mandatory column at the start of the file called 'Key':

This column is used to map and identify each of the tasks you are updating using this import template. Using one line for each Task, fill in your details and save the file. **Note that you do not need to fill in every field, only the ones you want to update.** If you leave a field blank in the CSV it will not clear the existing data in the Task, it will just be ignored.

Filter Deliverables Performance Report by Folio Fields

You can now filter the Deliverables Performance Report by fields on the Registers and Forms entry linked to the Deliverables Checklist, meaning that you can generate a report based on specific Contract fields:

Copy Only Selected Fields

In the last release we added a feature that lets you copy a Registers and Forms entry from one template to another, copying data from ALL fields that are shared by both templates. In this release we have made an improvement so that you can choose specific fields to copy over:
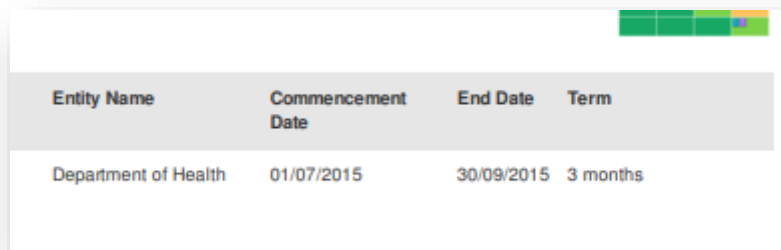
Bulk Retire Tasks/Checklists & Tasks/Checklist Assignments

From the Checklist or Task list screens we have added the ability to retire Tasks/Checklists or specific Tasks/Checklist Assignments in bulk:
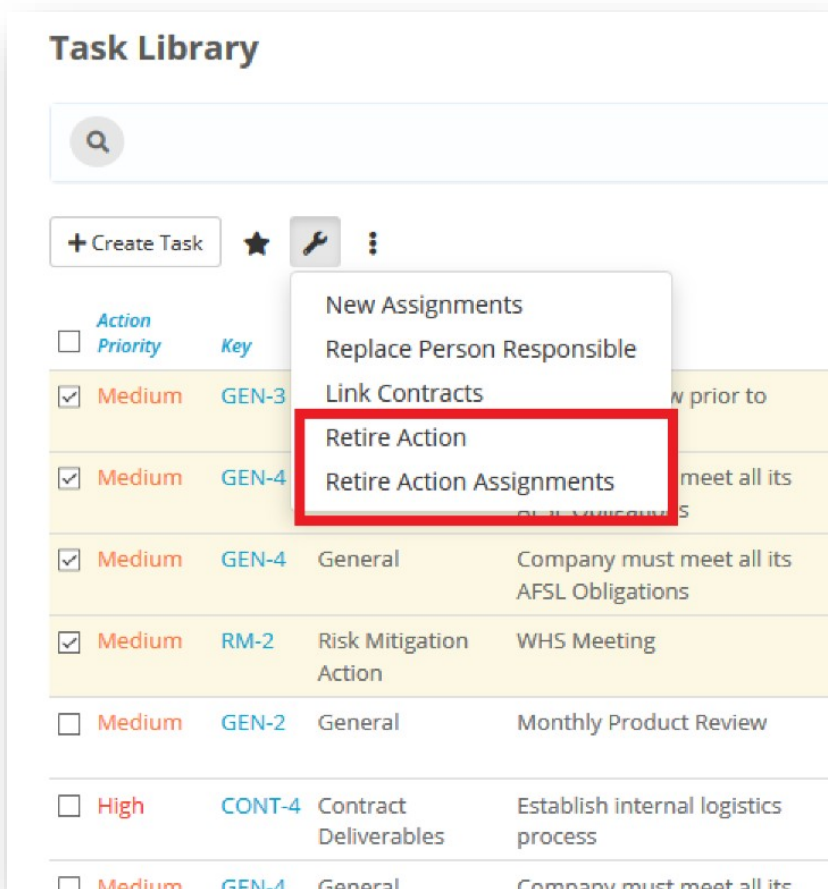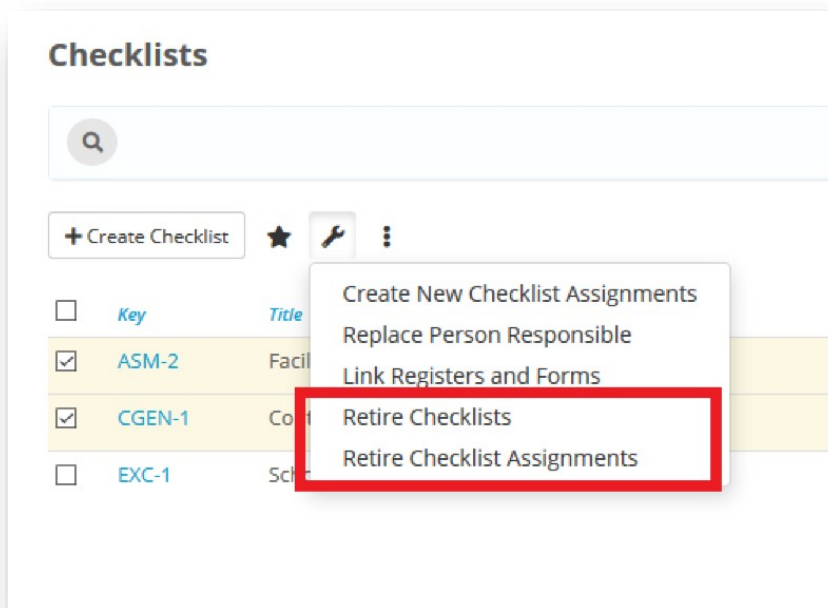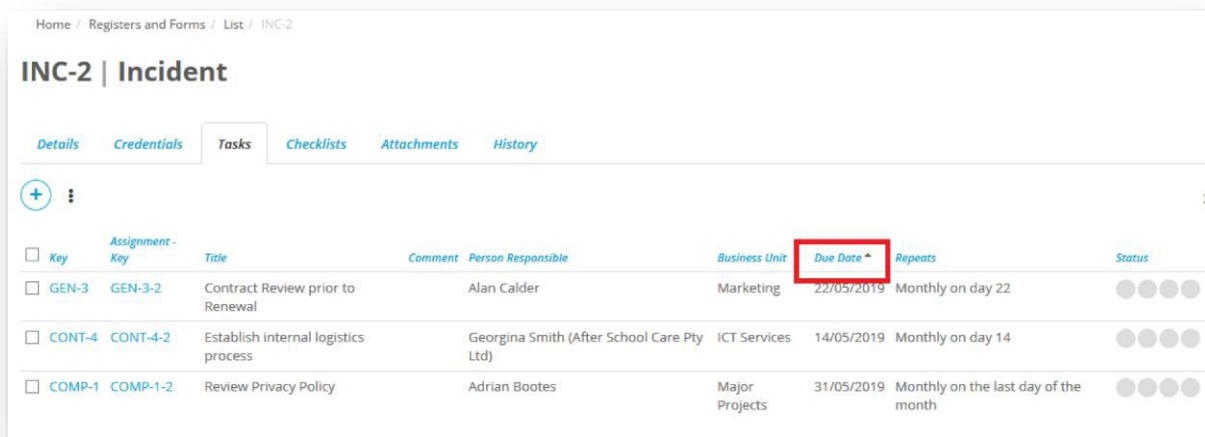
Term field added to Reports and Export to PDF

Registers and Forms inbuilt Term field for contracts can now be added to Registers and Forms Reports and the Export to PDF:

Sorting on a Registers and Forms Tasks/Checklists Tab

Users can now sort Tasks/Checklists linked to a Registers and Forms entry on the Tasks and Checklists tabs:

Easier Way to Setup Dependent Fields

When setting up a dependent field in Registers and Forms templates or Checklists, the dropdown is organised in clear sections to make it easier for users to pick either the whole section/table or the individual field/s: