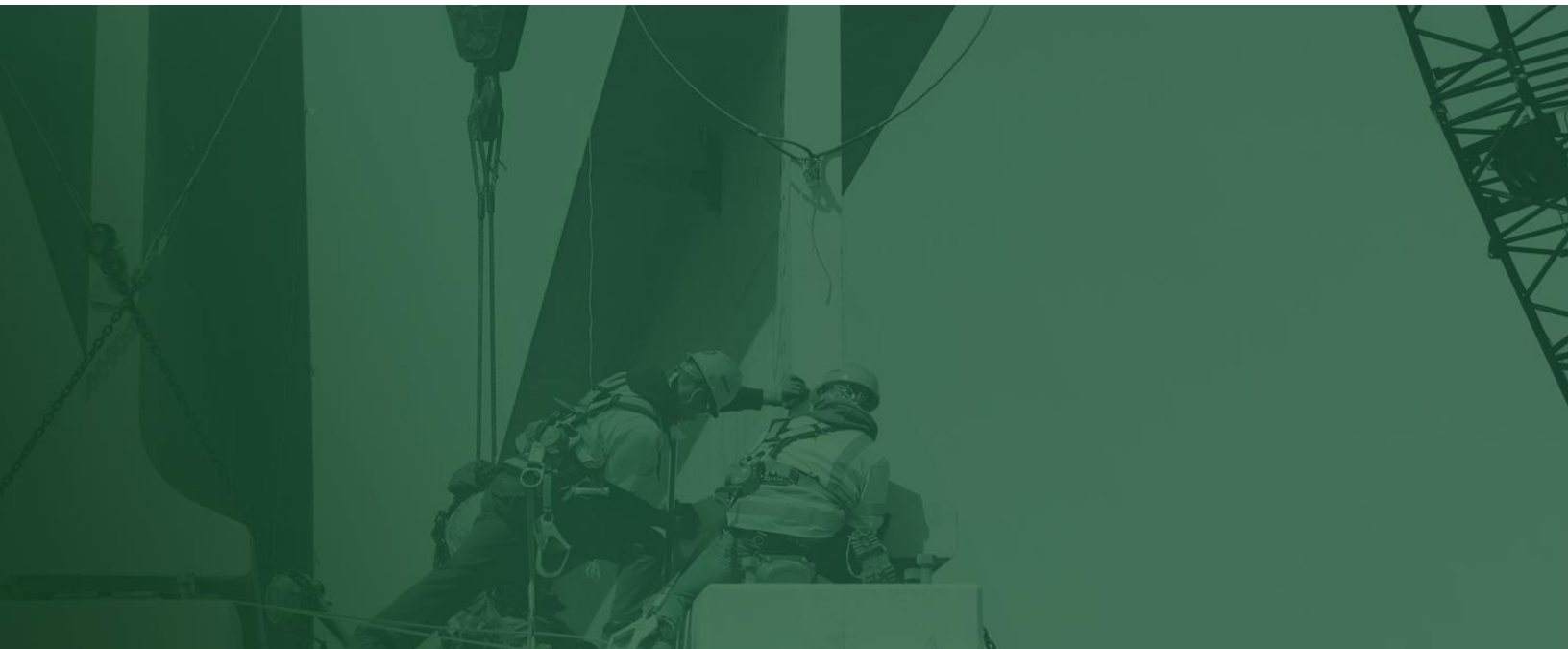




Compliance 19.7

Release Notes



Changelog

This changelog contains only significant or other notable changes to the document revision. Editorial or minor changes that do not affect the context of the document are not included in the changelog.

Rev	Date	Description
1.0	08-JUL-2019	Initial publication

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Release 19.7 summary

With the release of 19.7 Inspect has been renamed Compliance. Changes include the ability to see a form's state and add expiration and renewal dates to forms, in addition to other improvements.

New features summary

- **State column added to Events list** – You can now see a form's state, such as In Process, in addition to its status, which is helpful when you want to see both. [Read more.](#)
- **Expiration and renewal dates added to forms** – When building form templates, you can now add expiration and renewal dates and send email notifications, which is helpful when creating forms to capture data such as calibration records, permits and certifications. [Read more.](#)

Improvements summary

- **Mobile availability filter added to Templates manager** - You can now easily see which templates are available on mobile by selecting the  mobile icon in the Templates manager. [Read more.](#)
- **Name changed from Inspect to Compliance** – With the ever-changing requirements on a project and within an organization, we decided that the name Compliance better explained the full functionality of this tool.
- **Status column design changed in Events list** – The visual design of the Status column in the Events list was changed for easier navigation when viewing different forms in various statuses.
- **Email template design improved** - When you add an email to a question, you now see a large dialog box to configure the email template with features such as HTML and the ability to add fields by using the @ symbol to find common and form-specific variables.

State column added to Events list

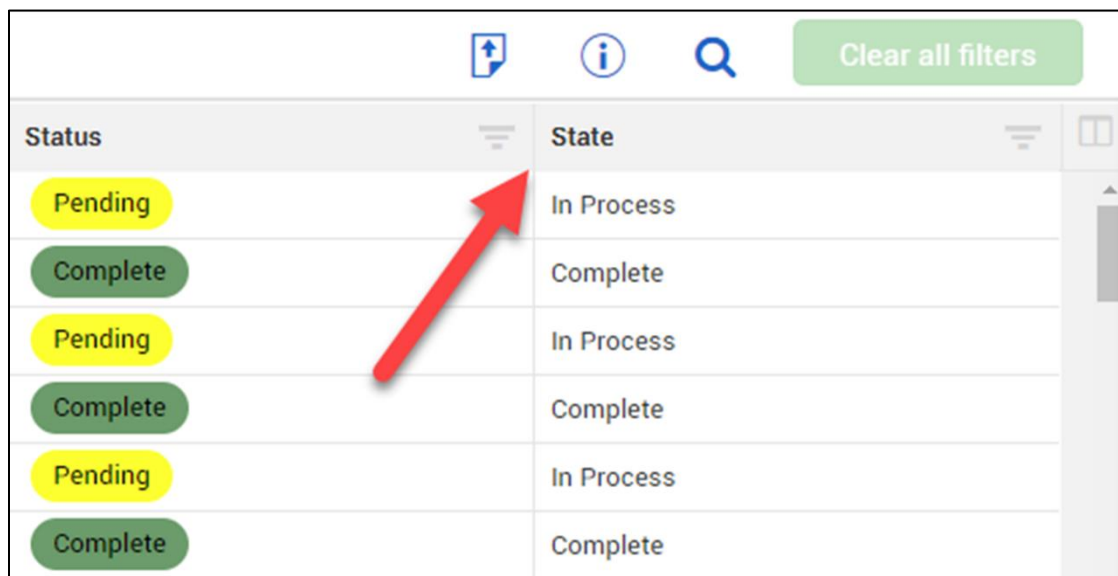
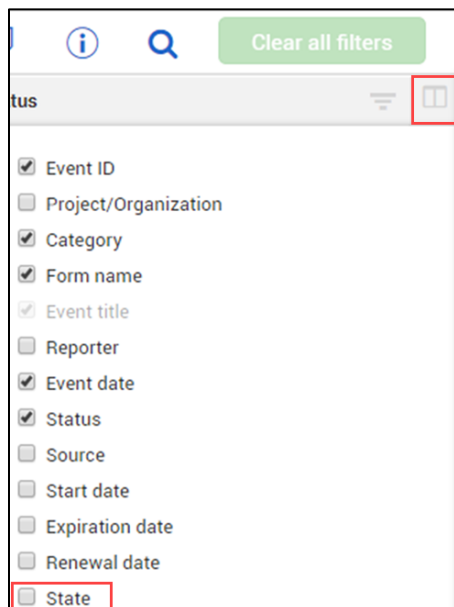
A new State column has been added to the Events list. You can now see a form's state, such as In Process, while also seeing the form's status.

The current states are:

- **In Process** – Appears for the status or child statuses of Pending
- **Complete** – Appears for the status or child statuses of Complete
- **Cancelled** – Appears for the status or child statuses of Cancelled

An Overdue state will be added in a later release.

To add the State column to your Events list view, use the Column chooser.

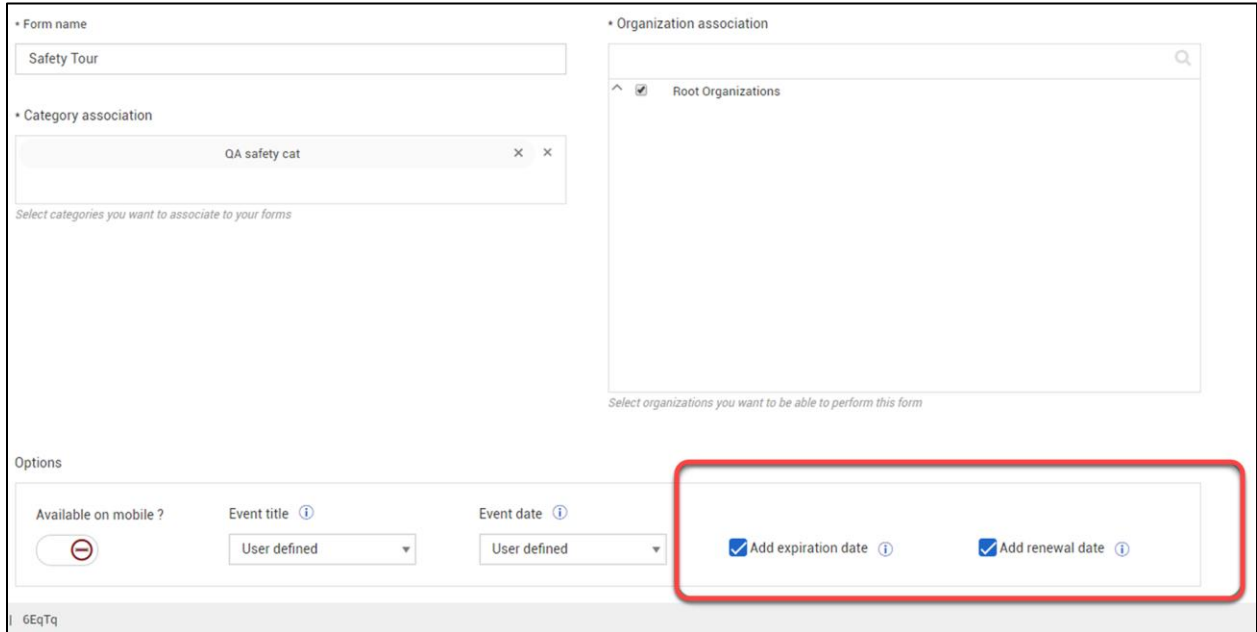


This screenshot shows the 'Events list' table after the 'State' column has been added. The table has two main columns: 'Status' and 'State'. The 'Status' column contains colored pill-shaped labels: yellow for 'Pending' and green for 'Complete'. The 'State' column contains text labels: 'In Process' and 'Complete'. A red arrow points from the 'Status' column to the 'State' column, highlighting the new addition. The table also features a 'Clear all filters' button at the top right.

Status	State
Pending	In Process
Complete	Complete
Pending	In Process
Complete	Complete
Pending	In Process
Complete	Complete

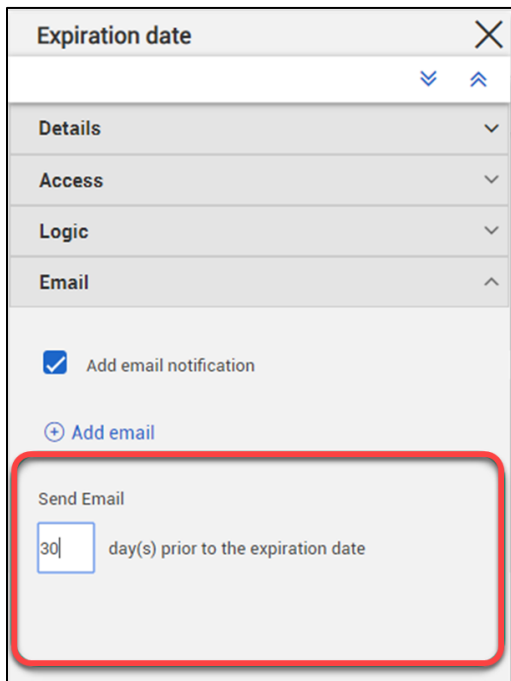
Expiration and renewal dates added to forms

When building form templates, you now have the option to add question fields to capture expiration and renewal dates. This is helpful when creating forms to capture data such as calibration records, permits and certifications. Expiration and renewal date columns are also now available in the Events list.



The screenshot shows the 'Form name' field set to 'Safety Tour' and the 'Category association' set to 'QA safety cat'. The 'Organization association' section shows 'Root Organizations' selected. In the 'Options' section, the 'Add expiration date' and 'Add renewal date' checkboxes are checked and highlighted by a red box. The 'Event title' and 'Event date' are both set to 'User defined'.

When adding these questions to the template you can also set up email notifications and when they are sent. For both expiration and renewal dates, you can set the number of days prior to the date provided to send this notification.



The screenshot shows the 'Expiration date' configuration modal with the 'Email' tab selected. The 'Add email notification' checkbox is checked. The 'Send Email' section, highlighted by a red box, shows a text input field with '30' and the label 'day(s) prior to the expiration date'.

When you enter a date of expiration or renewal, the system notifies recipients three times: the first time, the full number of days you provided before that date, the second time, half the number of days before, and the third time, a quarter of the number of days before the date.

For example, if you set the number of days before an expiration date to 30 on the template, then 30 days before the date, the system sends a notification to let recipients know the item will expire in 30. Fifteen days after that first notification (half of 30), the system sends another notification as a reminder. Seven and a half days after that notification (half of 15), another notification is sent as a final reminder.

NOTE:

These dates do not affect the state column, are not used as due dates and cannot become overdue.

Mobile availability filter added to Templates manager

You can now easily see which templates are available to use on mobile devices by selecting the  mobile icon in the top left of the Templates manager.

All templates available on mobile appear with the mobile icon on their card, regardless of whether you apply the mobile availability filter. When you apply the filter, only mobile templates are shown.

