
What's New in

PROQUIS enterprise 3.10.07sr7



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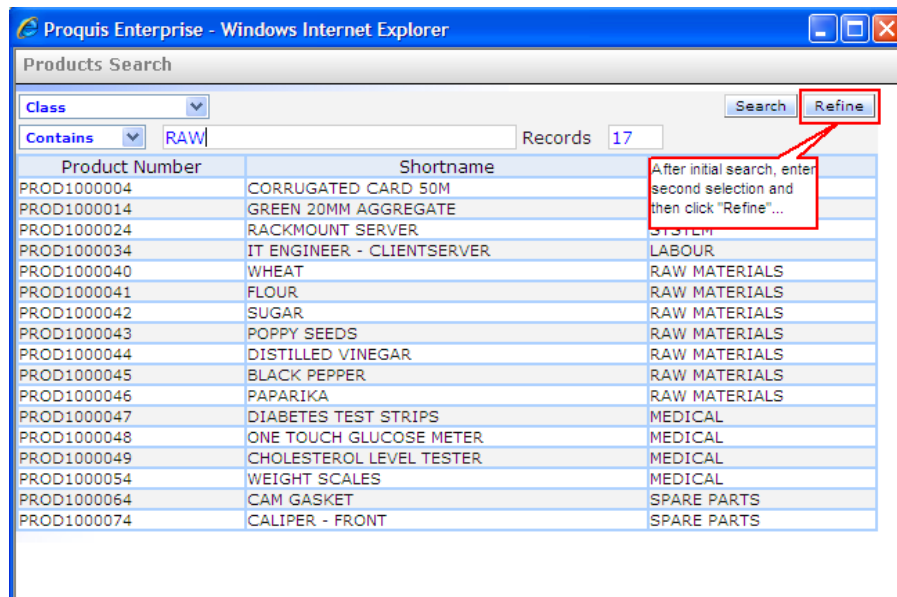
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General

Pop-up Search Enhancement.

We have received a series of requests for the pop-up searches to display more than 250 records. This limit was implemented to prevent any performance issues, however, for 3.10.07 SR7 we have introduced 2 enhancements to improve the pop-up searches. First, we have added a setting in the Base Tables/General Options/General Settings to allow you to define your preferred maximum number of records to return in a pop-up search, under the heading "Search Defaults". Secondly we have added an option to allow you to refine a search within the pop-up search. After the initial search is completed, you can then enter a second search criteria and click on "Refine" to apply that second selection to the existing returned list of records.



Implications of change: None – This provides enhanced searching options for all pop-up searches.

Audit Question Number field length.

It was found that the Audit Question number field on the audit Questions table (AUDQUES.AUDQUESNUMBER) was shorter than it had been in the old Proquis SBS system. This led to problems during upgrade from SBS. As a result, we have increased the length of this field to 15 characters for the V3.10.07 sr7 update

Implications of change: None – This solves an upgrade issue from SBS and provides additional flexibility for Enterprise.

Collation of Escalation/Reminder emails.

For V3.10.07 sr7, a change has been made to collate any reminder and escalation emails for each individual and to send a single email showing a list of any records that require attention for each individual. Previously, each record that was found to meet the criteria for reminders or escalation, would generate a separate email. The recipients would then potential receive multiple emails from Proquis. For SR7, the system finds all the records for a particular person, puts them on a single email and then sends it.

Base Table Maintenance

Pop-up Search Enhancement.

As referenced in the General items above, for 3.10.07 SR7 we have added a setting in the Base Tables/General Options/General Settings to allow you to define your preferred maximum number of records to return in a pop-up search, under the heading "Search Defaults".

Implications of change: None – This provides enhanced searching options for all pop-up searches.

Issue Notification Rules.

For 3.10.07 SR7, we have enhanced the options for defining INR's to allow you to define a rule that sets the required response and completion dates, but does not require you to define the Notify To as part of the rule.

Implications of change: None – This adds flexibility to the INR setup so you can have a rule to set deadlines, while keeping the flexibility to manually set the Notify To on the individual issues.

Document Control

Document Control option added.

A new Document Control option has been introduced... “Don't perform property update”. This new control option is placed below the “Perform Protection Check” option. This allows the user to decide that this document should NOT pass through the normal automation functions that we do for Word/Excel/Powerpoint/Allclear. The idea is that if the customer has documents that keep getting “stuck” for example in the Release stage, or when trying to Edit Draft, they can select this Control and it will bypass the automation functions that may be the cause of the problem. The real source of these problems is usually some password problem on the document, or some other strange document format problem... either way, we hope this will relieve some of the queries relating to this..

Implications of change: None – this is new functionality allowing the user to disable the automation for selected documents and therefore work around possible document problems. If you have experienced a problem in Editing/Viewing Draft, or on release of particular documents you may like to try selecting this Control option.

Email Notifications for Document Release.

For V3.10.07 sr7, we have added a new email template for notification emails where no action is required by the recipient. This new template (EMAILNOTNA.HTM) is supplementary to the existing notification email where action IS required by the user (EMAILNOT.HTM). Separating these 2 email formats allows the user (system administrator) to amend the format or wording of these 2 emails separately, for example to amend the standard wording at the top of the email message.

Implications of change: None – This provides additional flexibility for amending the format/layout/wording of the Proquis emails.

Clarification of Document Notifications..

There was some confusion among the users about how to set up the document distribution options to send notification emails. Some users had requested to be able to send notification emails to the authorizers to request their approval for a document release, but then have the option to NOT send the email to these authorizers when the document was finally released (on the grounds that they had already seen and approved the release anyway). In fact this has always been possible. On the document Distribution, we have an option “Notified of Authorization Requests and Releases?”. This actually controls only the sending of the notification emails for release/withdrawal. To avoid this confusion in future, we have amended the text of this option to read “Notified of Releases and Withdrawals”. If the option is selected to indicate that this person “Is required to Authorize document”, and the document control is selected to send authorization emails, then they WILL get the request for authorization email, even if the “Notified of Releases and Withdrawals” option is NOT selected. This text change has been implemented for V3.10.07 sr7 in both the document distribution and the document Type distribution screens.

Implications of change: None – This clarifies the function of the distribution option and hopefully avoids future confusion on this topic.

Issues and Actions

Evidence documents grid.

For V3.10.07 sr7, we have introduced an additional icon to evidence documents grid list to allow you to view the attached document directly from the grid. This saves having to click to view the details before you can click to view the actual document.

Implications of change: None – this is a new feature to help make access to the evidence documents easier and quicker.

Application of Issue Notification Rules.

A few problems were found in the practical application of the INR's, particularly when editing existing issue records. It was found that as you edit the issue, Proquis could continually re-apply the INR even if the user had manually amended the Notify To or Dates. This functionality has been greatly enhanced for V3.10.07 sr7 to make the application of INR's more intelligent. For this release onwards, Proquis only applies an INR if the matching rule is different to the one already applied. This prevents the system re-setting details that you have manually amended. In addition, Proquis now displays a message to indicate that either a Mandatory or an Advisory Rule has been applied. This helps the user understand why details are being set on the screen.

Implications of change: None – this enhances the intelligence and thus the useability of the Issue Notification Rules. Alongside the enhancement to the base table setting for INR's, this should be a very positive improvement in the functionality.

Equipment Control

Equipment Search by Organization.

For V3.10.07 sr7, we have introduced the option to search/navigate your equipment lists by organization hierarchy on the module home page.

Implications of change: None – this is a new search option from the module home page.

Asset tab - Screen Configuration.

We have added the screen configuration options in V3.10.07 sr7 for the Equipment “Assets” tab. Previously this was only available on the main details screen.

Implications of change: None – This extends the configuration options for 3.10.07 SR7. Please call support if you would like to configure these details.