Triline GRC

TriLine GRC V1.0.1.0 – New Features

The following items are included in TriLine GRC version 1.0.1.0.

AdHoc Query – Event List with Form Fields

This AdHoc Query is driven by the Event Type and only Event Types where a Form is defined will be available.

Select the Event Type from the drop down menu and set the date range.

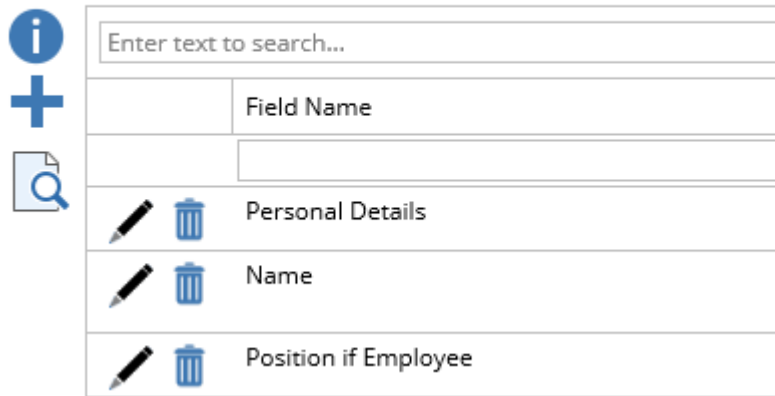All of the Form Fields for that Event Type will appear in the resulting grid.

Note: You will not be able to save the layout for this AdHoc Query due to the varying nature of the columns available.

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Preparing for use

This query relies on the Event Type Form Field Name value to work.

Work Health and Safety Issue Form Fields

It is strongly recommended that the Form Field Names are unique across all the forms and are not the same as any of the standard field names and custom field names that might appear in the query. For example one of the standard field names is 'Notes'. If you have a Form Field with the same name it should be changed to be unique (e.g. WHS Notes – using the example above).

Note: Changing the Field Name will not affect any data already in the system

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Event Tasks no longer required

In some situations you might end up with Event Tasks that are no longer required when the Event is closed.

The best example of this is a Customer Complaint. You might be required to perform a number of tasks based on how long the Event has been open. For example if not resolved in 5 days send a letter to the customer, then if not resolved in 45 days contact the Ombudsman. If the complaint is resolved in 7 days then the second task is no longer required.

With this release, if you change the Event Status to Closed and there are outstanding Tasks, a prompt will appear advising what Tasks are outstanding and noting that these will be deleted if you continue with the Status change.
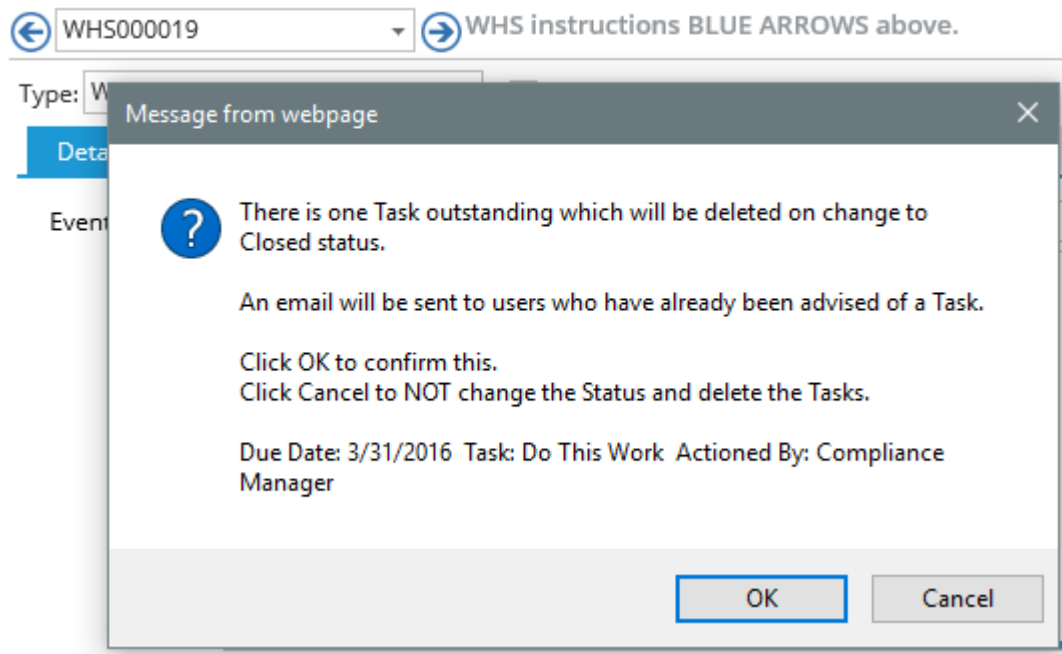
Note: If the Tasks need to be completed you cannot change the status to Closed.

Any completed Tasks will not be deleted.

If an email has already been sent notifying a Position of the Task they will receive a new email advising of the cancellation of the Task.

The deleted Tasks will be recorded in the record History.