

# Q-Pulse Cloud

## Version 8.1 new feature introduction

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# New features summary

## Documents

- Type prefixes
- Draft record creation (without attachments)
- Simplified document review
- Increased audit trail coverage
- Managed lists

## Audits

- Type prefixes
- Managed lists

## Issues

- Type prefixes
- Managed lists

## Interested Parties

- Functional administrator role
- Interested party types
- Review
- Record attachments
- Notifications on/off

## Assets

- Functional administrator role
- Unavailable reasons
- Record view enhancement
- Activities register
- Activity outcome
- Record attachments
- Notifications on/off

## Risks

- Functional administrator role
- Standalone risks ('lonely risks')
- Hazard enhancements
- Multi-perspective risk matrix
- Raise and view issues
- Assessment history enhancement
- Simpler risk assessment (banding)
- UI enhancements
- Notifications on/off

# Documents

## Type prefixes

Users can now customise the automated numbering sequences associated with a type, or types, of document. This allows more visibility and separation across document types within an organisation. For example, all policy type documents may now share the 'POL' prefix.

**Document type details** Associated items

Title \*  
Policy

Prefix \*  
POL

- Active
- Require changes to be logged
- Enable document overlay fields
- Locked
- Send batch upload notifications
- Controlled document
- Enable PDF conversion
- Watermark
- Allow batch uploading
- Download original file

An example of this is shown below. The document has been assigned the ID of POL-1.

ID	Title	Version	Status	Linked	Owner	Document type
POL-1	Policy for UAT	1.0	Draft	✕	Hall, George	Policy

## Draft record creation

It is now no longer necessary to add an attachment when creating a new document record. Such documents are now classed as 'Draft'. Attachment of a file becomes mandatory when converting into a live document.

ID	Title	Version	Status	Linked	Owner	Document type
POL-1	Policy for UAT	1.0	Draft	✕	Hall, George	Policy

## Simplified document review

A new, simpler approach to reviewing a document has been implemented. This allows a review to be raised by appropriate users and to capture basic details about the review as well as a suggested outcome, such as whether or not the document requires changing.

### Raise document review

Reason for review \*

Ad hoc review

Results

Results \*

Everything is good

Outcome \*

Please select an outcome ▾

- Please select an outcome
- Change required
- No change required

A list of all completed reviews can now be accessed from within the document details view.

### Document reviews

Date started: ▾ Version

#### Review log

Date started ^	Date completed	Version	Change required?
26 Mar 2021	26 Mar 2021	1.0	✘

1 items - 1 page(s)

« < 1 > » Show 10 per page

\* Permissions have been applied to this list.

## Increased audit trail coverage

The document audit trail has now been enhanced to capture and include all appropriate sign-off activities against a document and its record.

Document audit trail results for Policy for UAT

26 Mar 2021 12:11 UTC

Modified by George.Hall@Ideagen.com on 26 Mar 2021 12:11 UTC

- Issue date was changed from 07 May 2021 to 26 Mar 2021
- Status was changed from Awaiting issue to Live
- Sign-off provided by George.Hall@Ideagen.com on 26 Mar 2021 12:11 UTC

26 Mar 2021 12:09 UTC

Modified by George.Hall@Ideagen.com on 26 Mar 2021 12:09 UTC

- Issue date was changed from 26 Mar 2021 to 07 May 2021
- Status was changed from Awaiting approval to Awaiting issue

## Managed lists

A document type can now have managed lists associated with it. These lists are created by the organisation and can be assigned to one or many types. For example, a 'product' or 'process' list can now be created for use across the Documents, Audits and Issues modules. These could be used for capturing additional information against a document record, as a way of tracking and assigning scope items for an audit, or for tracking the root cause of a reported issue.

My Workspace > System > Managed Lists >

Edit managed list record: Process ✎ ⋮

Search  Filter Clear filter

List items Create

- Process 1
  - Child 1
  - Process 2
  - Process 3

Assigned lists appear under the associated items tab and can then be populated by the organisation as required. Default options can be added at a type level, and would then appear against all records of said type.

Managed lists Add list

Process Select Remove list

Code ^	Item	Description
	Process 1	<span>✕</span>

Products Select Remove list

Code ^	Item	Description
	Product 1	<span>✕</span>

# Audits

## Type prefixes

This introduces the ability for organisation to customise the automated numbering sequences associated with a type, or types, of audit. This allows more visibility and separation across audit types within an organisation. For example, all ISO 9001 type audits may now share the 'ISO9001' prefix.

Dashboard Documents Issues Audits

Create audit Audits list Findings Schedule Checklists Questions Responses

Audit type details Questionnaire Associated items

Code \*  
ISO 9001

Title \*  
ISO 9001 audit

Prefix \*  
ISO9001

Active  Require note with question response  
 Questionnaire modifiable  Set owner as auditor

An example of this is shown below. The Audit has been assigned the ID of ISO9001-1.

Findings	ID	Ref.	Title	Type	Owner	Status	Start date	End date
0	ISO9001-1	Audit	ISO Audit	ISO 9001 audit	Hall, George	Scheduled	29 Mar 2021	

## Managed lists

An audit type can now have managed lists associated with it. These lists are created by the organisation and can be assigned to one or many types. For example, a 'product' or 'process' list can now be created for use across the Documents, Audits and Issues modules. These could be used for capturing additional information against a document record, as a way of tracking and assigning scope items for an audit, or for tracking the root cause of a reported issue.

My Workspace > System > Managed Lists >

Edit managed list record: Process



Search

List items

Process 1

Child 1

Process 2

Process 3

Assigned lists appear under the associated items tab and can then be populated by the organisation as required. Default options can be added at a type level and would then appear against all records of said type.

Managed lists + Add list

---

Process + Select ✖ Remove list

Code ^	Item	Description
	Process 1	<span>✖</span>

---

Products + Select ✖ Remove list

Code ^	Item	Description
	Product 1	<span>✖</span>

# Issues

## Type prefixes

This introduces the ability for organisations to customise the automated numbering sequences associated with a type, or types, of issue. This allows more visibility and separation across issue types within an organisation. For example, all internal non-conformance type issues may now share the 'INT' prefix.

The screenshot shows the 'Issue type details' form. The left sidebar contains navigation options: Dashboard, Documents, Issues (selected), and Audits. The main content area is divided into three tabs: 'Issue type details' (active), 'Associated items', and 'Notifications'. The 'Issue type details' tab contains the following fields:

- Title \***: Internal Non-Conformance
- Issue type category**: Select (with a red plus icon) and Create (with a plus icon)
- Default subject**: Internal NCR
- Prefix \***: INT (with a plus icon)

An example of this is shown below. The Issue has been assigned the ID of INT-1.

Status	ID ^	Title	Date raised	Details of Issue:	Owner	Target date	Date closed
Raised	INT-1	Internal NCR	26 Mar 2021	Something went boom	Hall, George	25 Apr 2021	

## Managed lists

An issue type can now have managed lists associated with it. These lists are created by the organisation and can be assigned to one or many types. For example, a 'product' or 'process' list can now be created for use across the Documents, Audits and Issues modules. These could be used for capturing additional information against a document record, as a way of tracking and assigning scope items for an audit, or for tracking the root cause of a reported issue.

My Workspace > System > Managed Lists >

Edit managed list record: Process



Search

List items

- Process 1
  - Child 1
- Process 2
- Process 3

Assigned lists appear under the associated items tab and can then be populated by the organisation as required. Default options can be added at a type level and would then appear against all records of said type.

Managed lists + Add list

Process + Select ✖ Remove list

Code ^	Item	Description
	Process 1	<span>✖</span>

Products + Select ✖ Remove list

Code ^	Item	Description
	Product 1	<span>✖</span>

# Interested parties

## Functional administrator role

This introduces the concept of creating your own administration group and aligning it with a particular module or modules. Users assigned to these groups will inherit administration rights for each of the selected modules.

Dedicated Admin for IP Module

[Configuration](#) [Members](#) [Permissions](#)

---

**Details**

**Group Name \***

**Description**  
  
971 characters remaining

---

**Module Access**

Interested Parties

Risk  Assets

---

## Interested party type and review

This feature allows a customer to assign a type to an interested party record. For example, a 'Supplier' or 'Customer' type could be assigned to allow users of the system to categorise and filter any interested party records within their system.

In addition, a defined review period can be assigned against a type. This allows users of the system to ensure that interested parties are reviewed in line with their own policies and procedures and allows them to launch their own checks to ensure a supplier, for example, is still fit to be worked with.

The screenshot shows two panels. The left panel, titled 'Types List', features a search bar with a magnifying glass icon and the text 'Search', and a checkbox labeled 'Include Archived'. Below this is a list of categories: Bankers, Customer, Employees, Investors, Owners, Partners, Regulatory Bodies, and Supplier. The 'Supplier' category is highlighted with a light green background. At the bottom of this panel is a button with a plus icon and the text 'Add new item'. The right panel, titled 'Detail', shows the configuration for the 'Supplier' type. It includes fields for 'Title' (Supplier), 'Code' (SUP), and 'Description' (A person or organization providing a needed product or service.). Below these fields is a checked checkbox labeled 'Review Interested Parties of this type' and a frequency selector set to 'every 12 - Month(s)'.

## Record attachments

Documented information, such as ISO or insurance certificates, can now be attached to an interested party record within the properties section.

The screenshot displays a 'Supplier' record page. At the top left, the word 'Supplier' is followed by a green 'APPROVED' badge. To the right, the 'Account Manager' is listed as 'George Hall'. Below this, the 'Reference Number' is 'S1' and the 'Review Date' is '31 Mar 2021'. A navigation bar at the bottom of the header includes 'Details', 'Categories', 'Reviews', 'Reports', and 'Properties', with 'Properties' being the active tab. The main content area is titled 'Attachments' and features a large dashed box with the text 'Drag and drop file here OR Browse'. Below this box, a file attachment is shown: 'Example Supplier Scorecard.pdf' with a size of '0.28 MB'.

## Notifications on/off

This grants users the option of switching email notifications on or off as required. Emails can be turned off individually or all at once.

### Notification Management

<input type="checkbox"/>	Event Name	Recipients
<input checked="" type="checkbox"/>	Account Manager Assigned	Account Manager
<input checked="" type="checkbox"/>	Interested Party Approval Status Changed	Account Manager
<input type="checkbox"/>	Interested Party Archived	Account Manager
<input checked="" type="checkbox"/>	Interested Party Deleted	Account Manager
<input checked="" type="checkbox"/>	Interested Party Reviewed	Account Manager
<input type="checkbox"/>	Interested Party Updated	Account Manager

Rows per page

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# Assets

## Functional administrator role

This introduces the concept of creating your own administration group and aligning it with a particular module or modules. Users assigned to these groups will inherit administration rights for each of the selected modules.

Dedicated Admin for IP Module

Configuration Members Permissions

**Details**

**Group Name \***  
Interested Party Group

**Description**  
Dedicated Admin for IP Module  
971 characters remaining

**Module Access**

Interested Parties  
 Risk  Assets

Cancel Save Group Details

## Unavailable reasons

Equipment or assets can now be associated with an unavailable reason. These reasons display additional information to users about why an asset may not be used and can, if desired, also be associated with archiving the asset.

This will remove any upcoming activities to ensure users are not notified to, for example, calibrate a piece of machinery that is no longer available.

**Unavailable Reason List**

Search Include Archived

Broken  
Scrapped  
Calibrate before usage

**Detail**

Title  
Broken

Code  
BRK

Description  
Broken and beyond repair

Archive asset?  
Automatically archive and delete any associated outstanding activities on Asset when this 'Unavailable Reason' is applied.

## Record view enhancement

Equipment and assets can now be clearly labelled as available or not, along with an associated reason explaining why it is unavailable. For ease of use, this is quickly displayed within the assets register view:

<input type="checkbox"/>	ASSET NUMBER	ASSET TYPE	DESCRIPTION	SERIAL NUMBER	AVAILABLE	LOCATION
<input type="checkbox"/>	A2	Things/Office Furniture	Asset 2	2	<span style="color: red;">✗</span>	British Islands/The UK/England
<input type="checkbox"/>	A3	Things/Appliances	Asset 3	3	<span style="color: red;">✗</span>	Ireland
<input type="checkbox"/>	A7	Things/Office Furniture	Asset 7	7	<span style="color: red;">✗</span>	Malaysia/Kuala Lumpur
<input type="checkbox"/>	A4	Things	Asset 4	4	<span style="color: green;">✔</span>	British Islands/The UK/England/Tاون

This is also displayed within the asset record:

Things/Office Furniture UNAVAILABLE

**A2**

Serial Number	Location	Available	Unavailable Reason
2	British Islands/The UK/England	<input type="checkbox"/> No	Broken
Description			Owner
Asset 2			George Hall

## Activities register

A new register is now available which will show all activities scheduled within the organisation. Users can apply filters and other search criteria against the register to ensure only the data they wish to see is presented to them.

Activity Type

Any

- Annual Maintenance
- Pressure Testing
- Another Activity Type
- Final Activity Type

Asset Type

Any

Due Date From

Any

Due Date To

Any

Results

ASSET NUMBER	ACTIVITY TYPE	ACTIVITY OWNER	DUE DATE	PERFORMED DATE	PERFORMED BY	OUTCOME
A10	Annual Maintenance	grazyna grazyna	07 May 2020	28 Jun 2020	Supplier	
A10	Annual Maintenance	Eileen Aughey	05 Apr 2020	07 Apr 2020	Eileen Aughey	
A10	Annual Maintenance	grazyna grazyna	28 Mar 2020	28 Mar 2020		
A10	Annual Maintenance	grazyna grazyna	28 Feb 2020	28 Feb 2020		

More advanced search filters are available if required through the 'more options' filter.

A search filter panel with a search bar at the top. Below it are several filter categories, each with a dropdown menu set to 'Any':

- Activity Type
- Asset Type
- Due Date From
- Due Date To
- Activity Type Owner
- Activity Owner
- Asset Owner
- Asset Location
- Outcome

A 'Less options ^' link is located between the first and second rows of filters.

## Activity outcome

The outcome of an activity performed against an asset can now be captured through the use of a dropdown field linked to a managed list. This helps enforce consistency across the organisation by forcing users to select a pre-defined outcome rather than typing their own into the system.

This will also aid with trending and analysis when integrated with the upcoming Data API and BI layers of Q-Pulse Cloud.

**Completed activity**  
Populate the completed activity form including uploading of any evidence and attachments.  
On submission a new scheduled activity will be automatically added based on your repetition settings.

**Performed on**  
26 Mar 2021 00:00

**Performed By**  
Which user or interested party is performing the activity  
 Internal  External  
George Hall

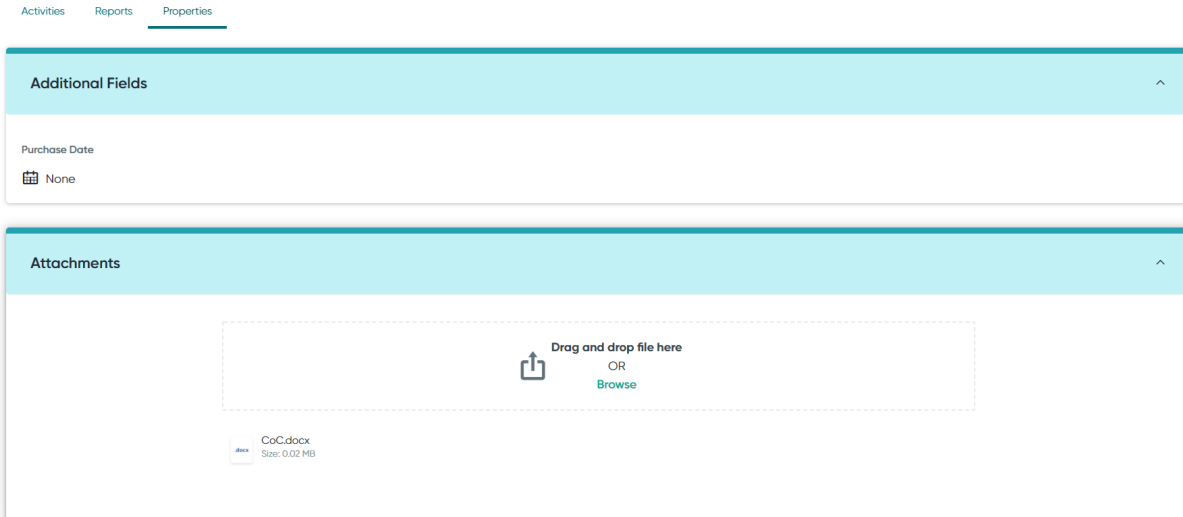
**Outcome**  
Completed

Search

- Calibration
  - Completed
  - Not needed
- Maintenance

## Record attachments

Documented information, such as an owner’s manual or associated certification, can now be attached to an asset record within the properties section.



## Notifications on/off

This grants users the option of switching email notifications on or off as required. Emails can be turned off individually or all at once.

### Notification Management

Search

<input type="checkbox"/>	Event Name	Recipients
<input checked="" type="checkbox"/>	Activity item deleted	Activity Item Owner
<input checked="" type="checkbox"/>	Activity item edited	Activity Type Owner, Activity Item Owner
<input type="checkbox"/>	Activity item owner changed/assigned/reassigned	Activity Item Owner
<input checked="" type="checkbox"/>	Activity item performed	Activity Type Owner, Activity Item Owner
<input checked="" type="checkbox"/>	Activity type deleted	Asset Owner, Activity Type Owner, Activity Item Owner
<input checked="" type="checkbox"/>	Activity type owner changed/assigned/reassigned	Activity Type Owner
<input checked="" type="checkbox"/>	Asset owner changed/assigned/reassigned	Asset Owner
<input checked="" type="checkbox"/>	Asset record deleted	Asset Owner, Activity Type Owner, Activity Item Owner
<input checked="" type="checkbox"/>	Asset record edited	Asset Owner
<input type="checkbox"/>	Asset status updated	Asset Owner, Activity Type Owner, Activity Item Owner

Rows per page: 10

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# Risks

## Functional administrator role

This introduces the concept of creating your own administration group and aligning it with a particular module or modules. Users assigned to these groups will inherit administration rights for each of the selected modules.

Dedicated Admin for IP Module

Configuration Members Permissions

**Details**

Group Name \*  
Interested Party Group

Description  
Dedicated Admin for IP Module  
971 characters remaining

**Module Access**

Interested Parties  
 Risk  Assets

Cancel Save Group Details

## Standalone ('lonely') risks

A risk can now be created that does not need to be associated with a risk register, as there may be times where this is more appropriate for your risk management activities. All risks within the system can now be viewed in their own register, or added to a broader register with other risks at any time.

Q-Pulse > Risks

**Risks** Create Risk

Q Enter Title, Description or Keyword

Status: Active Residual Rating Band: Any Owner: Any Relationships: All Risks

Review Date From: Any Review Date To: Any

Results (306)

	TITLE	OWNER	STATUS	INHERENT ASSESSMENT	RESIDUAL ASSESSMENT	TARGET ASSESSMENT	REVIEW DATE
<input type="checkbox"/>	Risk 1	Martin Fisher	ACTIVE	E2		D3	
<input type="checkbox"/>	Risk 100	Kate Dervan	ACTIVE	A3	A1		
<input type="checkbox"/>	Risk 101	Marie Teresa Sanfelin Ribot	ACTIVE	E3	A2	A5	

## Hazard enhancements

Against an identified hazard, it is now possible to more easily see which risks and registers are associated with it. At a glance, information is also available for risk scores. Any related attachments can also be added within the attachments tab for future reference or viewing.

*N.B. Hazards may be hidden at first as these are directly related to the bowtie functionality which will soon be available.*

**Working at Height**

Code	Type	Source
HEIGHT	Lack of Training	Human

Description  
Work carried out at Height

Risks Risk Registers Attachments

Find and add Risks to this Hazard

 + Create Risk

Status: Active | Owner: Any | Search:

Results (1)

TITLE	OWNER	STATUS	INHERENT ASSESSMENT	RESIDUAL ASSESSMENT	TARGET ASSESSMENT
Risk 1	Martin Fisher	ACTIVE	E2		D3

## Multi-perspective risk matrix

A risk matrix can now have multiple perspectives associated with it when carrying out an assessment.

### Perspectives

You can assess risks according to multiple perspectives of severity

#### Perspective List

Manage Ordering

- Financial
- Operational**
- Reputational
- Environmental

#### Detail

**Title**  
Operational

**Decision Aid**  
How are we impacted from an Operational perspective?

**1 - Severity 1**  
Not bad

**2 - Severity 2**  
Kinda bad

**3 - Severity 3**  
Really bad

These perspectives are presented to the user to support their risk scoring, and allow consideration of financial or reputational viewpoints, for example.

This allows a more detailed and nuanced approach to risk assessment and allows you to take all of your risk perspectives into account.

Risk Rating Band



Very High Risk

Dry days stars. Is were meat whose kind is divide. Image it you'll us, itself given may is. Multiply.

Likelihood

2 - Likelihood 2

Comment

No comment

Financial

1 - Severity 1

No cost

Comment

No comment

Operational

2 - Severity 2

Kinda bad

Comment

No comment

Reputational

2 - Severity 2

Some probs

Comment

No comment

Raise and view issues and reports

A defined workflow, associated with an issue type, can now be raised against a risk record. This allows workflows to be used for control implementation or risk treatment plans, for example.

Associated reports can also be viewed from here.

Risk 1

<b>Code</b> RK1	<b>Owner</b> George Hall	<b>Accountable Party</b> Vincent Pickering	<b>Type</b> Strategic	<b>Source</b> Human	<b>Hazard</b> Working at Height
<b>Residual Assessment</b> 26 Mar 2021 George Hall Treat Small 3x3	<b>Review Date</b> 31 Mar 2021	<b>Description</b> Every without. Their to appear every fourth tree face of said can't over void moving. Doesn't give... <a href="#">Expand Description</a>			
<b>Residual</b> 2	<b>Inherent</b> 6	<b>Target</b> 1			

Controls   Current Assessment   Assessment History   Stakeholders   Risk Registers   **Reports**   Attachments

**Risk 1**

[View associated reports](#)   [Raise a report](#)

## Assessment history enhancement

Each risk record now has an enhanced assessment history tab. This displays all assessments carried out and by whom. The 'view details' area will display the scores assigned against each perspective of the risk to show how the risk score has been achieved.

Controls   Current Assessment   **Assessment History**   Stakeholders   Risk Registers   Reports   Attachments

### Assessments

Type: Any   Residual Rating Band: Any   Strategy: Any   Assessed By: Any

Results (8)

TYPE	DATE	ASSESSMENT	STRATEGY	ASSESSED BY	METHOD	MORE INFO
Target	26 Mar 2021	1		George Hall	Small 3x3	<a href="#">View Details</a>
Residual	26 Mar 2021	2	Treat	George Hall	Small 3x3	<a href="#">View Details</a>
Inherent	26 Mar 2021	6		George Hall	Small 3x3	<a href="#">View Details</a>

## Simpler risk assessment (banding)

Rather than carry out an assessment with a full risk matrix, there is now the option to use a simpler banding assessment method.

This allows a risk to be assessed using the bandings set by your organisation and removes the scoring aspect.

### Set Assessment Method

Future assessments of this risk should use which method?

Assessment Method

Risk Rating Band

Risk Matrix

[Update](#)

## Risk Rating Bands

Risk rating bands are used on risk matrices to represent the level of threat or opportunity a risk represents

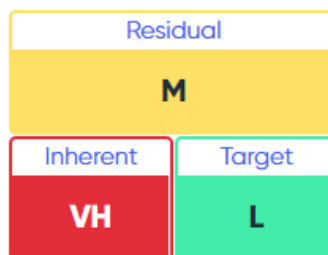
### Risk Rating Band List

Find in list  Include Archived

Manage Ordering

- Very Low Risk
- Low Risk
- Medium Risk
- High Risk
- Very High Risk

A risk score using the banding method is shown below.



## UI enhancements

Some colour changes have been made to make it easier to read the scores associated with a risk. White text on a red background replaces the old black text on a red background.

## Notifications on/off

This grants users the option of switching email notifications on or off as required. Emails can be turned off individually or all at once.

### Notification Management

<input type="checkbox"/>	Event Name	Recipients
<input checked="" type="checkbox"/>	Inherent Risk Assessed	Risk Owner, Risk Accountable Party, Risk Stakeholder
<input type="checkbox"/>	Register Archived	Register Owner, Register Stakeholder
<input checked="" type="checkbox"/>	Register Changed	Register Owner
<input checked="" type="checkbox"/>	Register Created	Register Owner
<input checked="" type="checkbox"/>	Register Owner Changed	Register Owner
<input checked="" type="checkbox"/>	Register Re-Prioritized	Register Owner, Register Stakeholder
<input checked="" type="checkbox"/>	Register Risk Added	Register Owner, Register Stakeholder
<input type="checkbox"/>	Register Risk Removed	Register Owner, Register Stakeholder
<input checked="" type="checkbox"/>	Register Stakeholder Assigned	Register Stakeholder
<input checked="" type="checkbox"/>	Register Stakeholder Un-assigned	Register Stakeholder

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## Talk to us

Questions about the latest features of Q-Pulse Cloud?

Want to explore how to apply our software's powerful functionality to your business needs?

[ideagen.com/contact](https://ideagen.com/contact)

