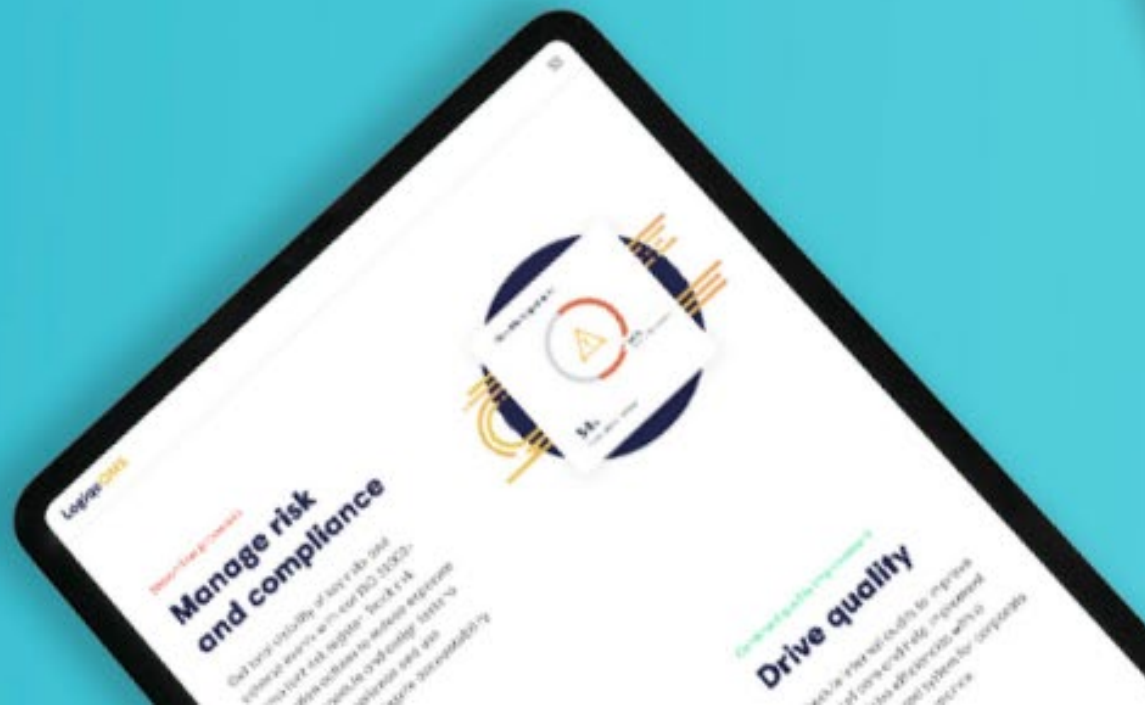


New version

Transition to v7 workbook

LogiqcQMS v7 is designed to help you better manage security and complexity.

This workbook outlines what you need to know, what the new features are, and what you need to do.



What do I need to know?

Q What is the new version all about?

A The new features in LogiqcQMS v7 are designed to give you more control over information security and to make it easier to manage user permissions, tasks and responsibilities.

Q Why have we upgraded the platform?

A Customer feedback told us that better tools were needed to manage the complexity of security, permissions and large numbers of users with multiple roles and working across multiple teams.

Q Is the upgrade mandatory?

A Yes, all LogiqcQMS v6 systems will be upgraded in the evening of 31 October 2022.

Q What are the benefits?

- Increased control over the permissions for what users can do on the platform.
- Increased flexibility and control over user access (viewing permissions) to register items.
- Improved security controls and compliance with information security requirements.
- Simplified management of permissions and user licensing.
- Reduced administrative burden of managing users and task re-assignment.

Q Is data going to be affected?

A No, the upgrade is an enhancement of existing systems and not a migration of data to a new system. So, data will remain unchanged.

Q Who will notice the most change?

A After the upgrade, all users will be able to log in and use the platform as normal. Most users won't notice any immediate difference to most of the tasks they perform. System Administrators will notice the most change. Their admin accounts will be merged with their user accounts for quick access to admin functions.

Q Do all users need training?

A No, most of the changes are only visible to System Administrators. General users will see a new component called 'Access control' instead of the viewing permissions menu.

Q What do I need to do?

A We recommend that your Quality Manager reviews how you can take advantage of the new features and subscribe to our webinars. See checklist on page 4.

What are the main new features?

Feature	Description and examples
Assignable user permissions:	<p>Dozens of new assignable permissions for you to use to control exactly what users can do in the platform.</p> <p>Choose from up to 58 different permissions to assign to different groups of users (Roles) to control specifically what people are authorized to do in the platform.</p> <p>Examples of assignable permissions are: Add contracts, Schedule tasks, Manage documents, and Approve risks. There are also 9 different admin and super admin permissions which means you can create a role for administrators that just need to manage users and another role for administrators that need to edit system settings and menus.</p>
Roles:	<p>Roles are permission 'sets' that you create and assign to users. Roles make it easier to manage user 'rights' and security controls.</p> <p>Create different roles to allow users to manage and approve some register items but not others eg. Document owners, Risk managers, and Contract managers.</p> <p>Assign these roles only to the users who are authorised to have these permissions.</p>
Teams:	<p>Teams are groups of users that you create that can be assigned to register items to grant access/viewing permissions.</p> <p>Create teams that are relevant and specific to your organisation eg: Senior Management Team, HR officers, Health workers, RN's, Doctors, Field officers etc.</p> <p>These are now the user groups that will be displayed when users select viewing permissions for items in the platform.</p>
Admin mode	<p>System administrator accounts are now merged with user accounts so users with admin rights have one single user account and can switch to 'Admin mode' with one click.</p>
Increased security	<p>Greater control over who has access to sensitive data including permissions for downloading and exporting data.</p> <p>Use the new assignable permissions to ensure users have just the permissions they need to operate in the platform, not more. New permissions to prevent download and exporting can also be used to mitigate information security breaches.</p>
Task merge	<p>A game changer! Use this feature to merge tasks and responsibilities (including unassigned 'position vacant' tasks) from one position into another position.</p>
Access control component	<p>A new component called Access control replaces the viewing permissions field. Allows selection of one or more Teams who can view the item.</p>

What do I need to do?

There is nothing you have to do immediately. After the upgrade, all users will be able to log in and use the platform as normal and most users won't notice any immediate difference.

The most important first step is to let us know which user/s should have the new 'Super Admin' permissions. With these permissions you can grant admin permissions and 'view all' permissions to other users. We have created a role called 'Super Admin' with these permissions but no one is assigned to this role as it allows greater control than the previous v6 platform allowed.

There are many new opportunities to update your platform to make use of the new v7 features. But we know you're busy so to help you focus on the *main* things that need to be done, we've created the following checklist as a guide.

Checklist	Status
Do sooner	
1. Notify us of who will be your super admin (to safeguard your security we will only act on instructions from the CEO or equivalent). Click here to notify us.	<input type="checkbox"/>
2. Register for and/or watch our v7 webinars. Click here for more information.	<input type="checkbox"/>
3. The most noticeable change for general users is the new way of setting viewing permissions. Ensure staff are aware of this change by sending them this link https://knowledgebase.logiqc.com.au/new-v7-access-control-component	<input type="checkbox"/>
4. Switch to Admin mode (in your account menu) and review the selected contacts in the new Account page (Only registered primary contacts have permission to edit this page but you can adjust this).	<input type="checkbox"/>
Do later	
5. Review the Teams in your platform and consider creating new teams for better management of access control (ie. viewing permissions). We have provided examples of what you can setup in your platform. Click here to learn more about Teams and to view examples and click here to access webinars. Tip: If you create new teams, remember to adjust any Business Rules you may have created in the platform to include the new teams.	<input type="checkbox"/>
6. Review the Roles in your platform and consider if these roles (permission sets) suit your needs of whether you want to expand them.). Click here to learn more about roles and to view examples and click here to access webinars. Explore all the assignable permissions and consider which who should have which permissions, specifically, the admin and super admin permissions. Learn more about Permissions and click here to access webinars.	<input type="checkbox"/>
7. Learn more about the new Admin mode.	<input type="checkbox"/>
8. Learn more about Task management.	<input type="checkbox"/>

LogiqcQMS

AU +617 3216 0335 **NZ** 0800 002 280 **E:** info@logiqc.com.au **W:** logiqc.com.au

<https://knowledgebase.logiqc.com.au/>

<https://academy.logiqc.com.au/>