



## TECH SUPPORT ARTICLE **TSA 0029 Unify Topics**

More articles at: <https://qudos-software.com/tech-support-qudos-3/>

### **Application**

This article relates to installations being updated to version 3.36.

### **Background**

Over the years, we have added Topic or Category fields in various modules to help you better define your records and refine searches. These have now been combined into one integrated **Topic** field that is common across all modules. The fields that have been integrated are:

- Objective topic
- Document topic
- Audit topic
- Action topic
- Training category
- Risk category
- Benchmark category

In version 3.36, all these fields have been renamed on the forms as **Topic**. **This integration creates consistency and means that you only have to create topics in one place** (the properties for this integrated field are set in the General area of the Lookup Tables).

### **Method**

To best utilise the new facility, Administrators need to verify and configure the unified topic entries. The following are the steps to unify the Topic options that you make available to your users.

No.	Step	Result
1	From the Menu item Edit / Management Console, click on the <b>Lookup</b> button.	This will open the Lookup tables.
2	Ensure that the 'Module' field is set to <b>General</b> , and Set the 'Display Codes for' option to <b>Topic</b> .	You should see a list of all your current topic options.
3	Click on the button labeled 'Unify Topics and Categories'.	This displays a table with columns for:  (a) The module and old field name (b) The previous option name (c) The new option name.  This tool gives you the opportunity to review your existing entries, and if they have slightly different labels you may now unify them e.g. if you had a Risk Category of 'Quality' and a training Category of 'Quality Assurance' you may decide to change the Training one to also be 'Quality'.

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Illustration of **Unify Topics and Categories** table prior to change being made

4	Click in the field that you wish to rename and pick the new option from the drop-down list.																																		
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		illustration of <b>Unify Topics and Categories</b> table after change being made to Training category (from Quality Assurance to Quality)																																	
5	Once finished making changes, click Save and Close.	You are returned to the Lookup Tables																																	
6	You should then deactivate any options that you are no longer using from the Topics list. In the example above, you would click the Edit link in the 'Quality Assurance' record, uncheck the Active checkbox and Save.	The entries are unified																																	

### Multi-level topics.

Topics no longer have to be a simple drop-down list. If you prefer, you now have the option of creating multi-level topics in a tree structure. Once you have carried out the review and configuration above, you

may consider implementing this enhancement. See video in the Online Reference Centre or [contact us](#) to discuss further.

For example, a topic 'OHS' may have sub-topics such as 'Electrical safety', 'Manual handling etc.'

An alternative model may be for a topic based on an ISO standard to have sub-topics based on clauses of that standard e.g. 'ISO 27001 information Security' may have '7 Support' or 'A8 Asset Management'.