Certainty Software Release Notes

Version 4.4

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Contents

Overview

The primary objective of the 4.4 release is to enhance the usability of our administration tools by introducing a range of quality-of-life features. Notably, we have addressed the long-standing request for a ‘Mandatory before next step' option, which enables the enforcement of mandatory items within workflows before step transitions.

New features in this release

- ✔ Checklist builder performance improvements
- ✔ Custom Reports available as an alternative to the standard completed checklist PDF report
- ✔ Options for physical addresses added to sites
- ✔ Bulk transfer responsibility between users
- ✔ Permissions for user group responsibility assignments in actions
- ✔ Improvements to scheduling
- ✔ Options for checklist and action workflows
- ✔ Change history for completed checklists
- ✔ New optional fields for user profiles
- ✔ Ability to view checklist question details while working on actions
- ✔ Bug fixes

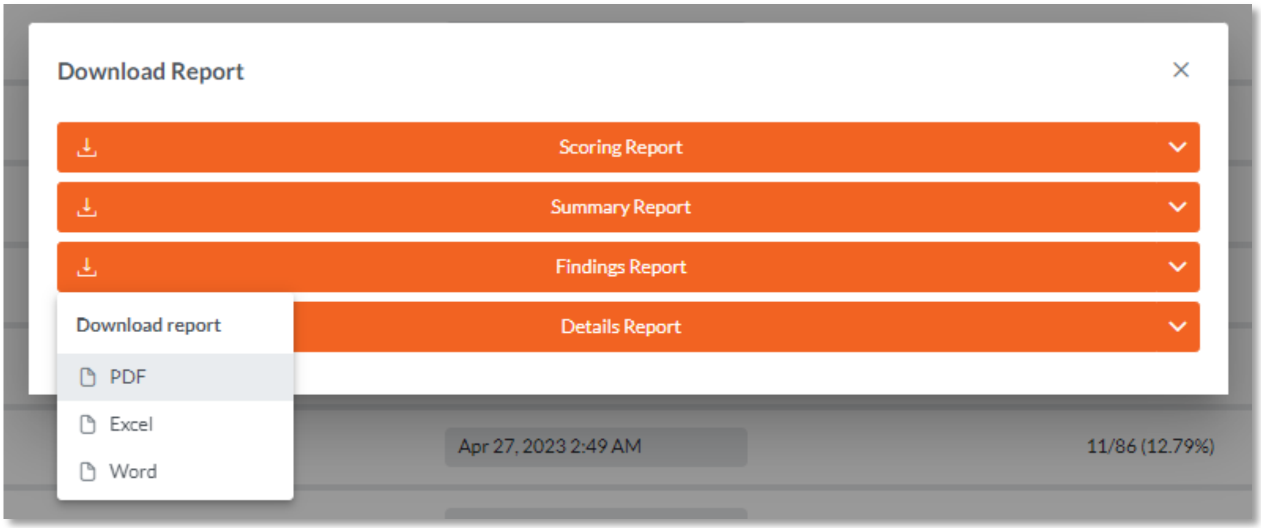
Checklist Builder Performance Improvements

We're excited to share that the checklist builder has undergone a recent upgrade to enhance the speed and efficiency of the save and publish functions. Although this update focuses primarily on performance improvements, it is designed to provide you with a smoother and more responsive checklist-building experience.

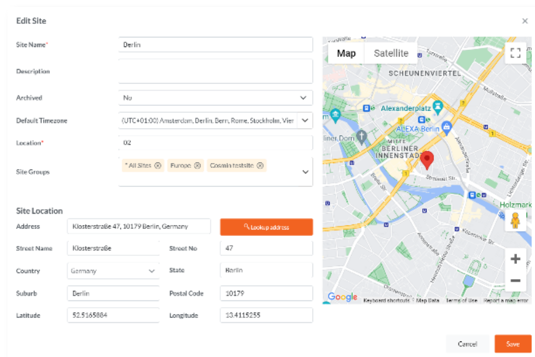
We understand that efficiency is crucial in your day-to-day operations, and this enhancement reflects our commitment to continuously improve your user experience.

Custom Reports Available for Download

In response to the needs of our valued users, we are pleased to introduce an exciting update that enhances the reporting capabilities within the app and administration sides of our platform. Previously, users could download the *standard* completed checklist PDF report of a submission. Now, we are taking it a step further by enabling the download of checklist specific *custom* reports in PDF, Excel, and Word, directly from the interface. Contact support@certaintysoftware.com to discuss your custom reporting requirements.



Options for Physical Addresses on Sites



With our latest update, you now have the option to provide sites with a physical address and GPS coordinate information.

Assigning a physical address to your sites allows for easier navigation and identification, making it convenient for field personnel and administrators alike. The GPS information further enables precise geolocation and geospatial analysis, providing you with valuable insights into the distribution and geographic patterns of your sites.

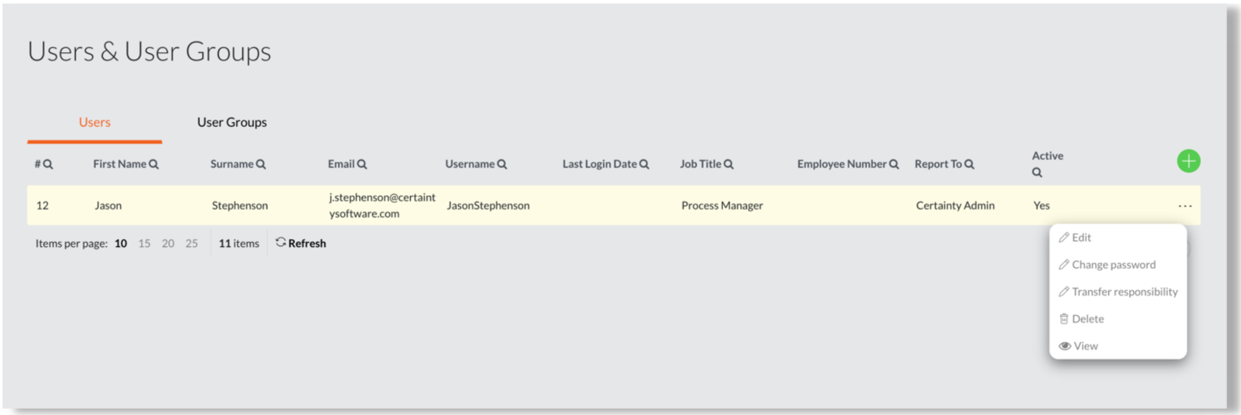
This update streamlines your site management processes by centralizing and organizing all the pertinent location information within Certainty Software. You can effortlessly access and update the address and GPS coordinates details associated with each site, ensuring data integrity and reliability.

Bulk Transfer Responsibility Between Users

With our latest update, you can now transfer user responsibilities in bulk directly from the Users and User Groups interface.

With this update, you now can transfer responsibilities for various aspects of Certainty Software, either for all responsibilities or specifically within a given timeframe. This enhanced flexibility empowers you to optimize administrative tasks, particularly when navigating scenarios such as extended employee leave or organizational changes.

The option to transfer responsibilities applies to either all responsibility categories or specific responsibilities within a designated timeframe, providing you with precise control over user responsibility management.



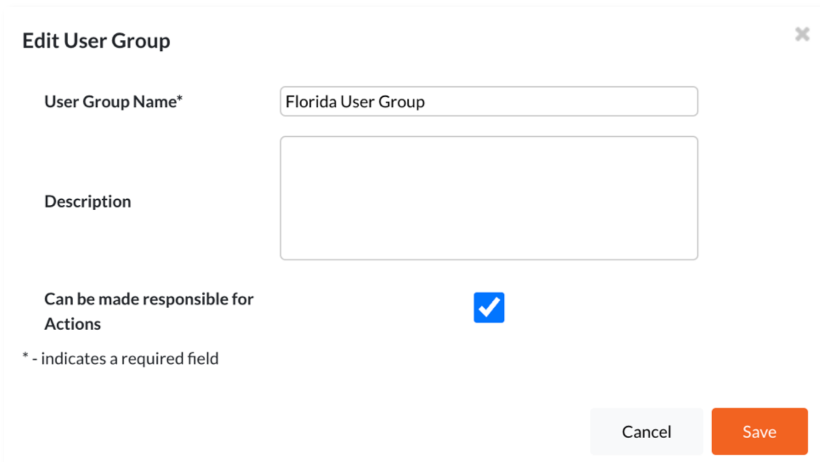
The following responsibilities can now be transferred in this convenient manner:

- **Completed Checklists:** Easily transfer ownership of completed checklists, ensuring smooth handoffs and seamless continuity in your workflow.
- **Completed Checklist Shared Access:** Transfer shared access rights for completed checklists, allowing new users to access and collaborate on checklists.
- **Scheduled Events:** Reassign scheduled events to ensure timely execution by a different user.
- **Action Responsibility:** Delegate action responsibilities to the appropriate users, maintaining accountability and effective task allocation.
- **Site Manager:** Seamlessly transfer site management responsibilities, ensuring the smooth transition of oversight and control.
- **User Reports To:** Transfer reporting relationships, ensuring clarity and accurate hierarchy within your organizational structure.
- **User Groups:** Easily replace users within different groups, optimizing team collaboration and access permissions.
- **Checklist Notifications:** Transfer responsibility for receiving checklist notifications, ensuring relevant parties stay informed.
- **Action Notifications:** Transfer responsibility for receiving action notifications, keeping the right individuals in the loop.
- **User Checklists Will Be Visible To:** Manage visibility permissions for checklists, ensuring appropriate access for the right individuals.
- **Users That Can Be Granted 'Shared Access to Checklist':** Transfer the ability to be granted shared access to checklists, enhancing collaboration and flexibility.

Permissions For User Group Responsibility Assignments within Actions

Previously, users had the ability to assign responsibility for actions they were creating to any user group in the entire instance. This occasionally resulted in issues, especially when the '* All Users' user group was assigned as being responsible for an action. We have taken this feedback into account and introduced a new option on the Administration site's, User Group page to address this concern.

With the latest update, you now have the flexibility to toggle a User Groups availability within action responsibilities on or off, providing you with greater control over how responsibilities are assigned. This new feature ensures that responsibility assignment aligns more closely with your specific needs and preferences.

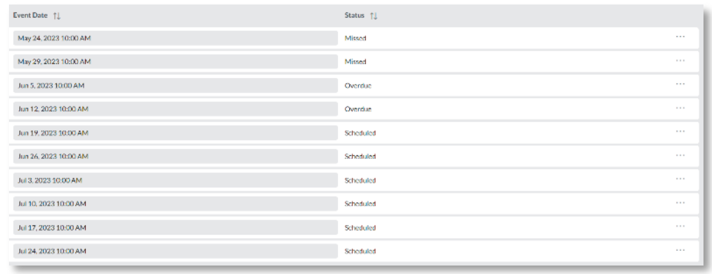


By default, all existing User Groups will have the feature toggled on, which means that your current settings and processes will remain unaffected unless changed by a user with the appropriate permissions.

We have also introduced the option to completely remove the ability to assign User Groups as responsible for actions. Contact support@certaintysoftware.com if this is something you are interested in.

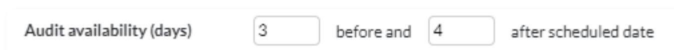
Improvements to Checklist Schedules

With this latest release, scheduled submissions will be conveniently marked with one of the following statuses based on their relation to the due date and current status:



Event Date	Status
May 24, 2023 10:00 AM	Missed
May 29, 2023 10:00 AM	Missed
Jun 5, 2023 10:00 AM	Overdue
Jun 12, 2023 10:00 AM	Overdue
Jun 19, 2023 10:00 AM	Scheduled
Jun 26, 2023 10:00 AM	Scheduled
Jul 3, 2023 10:00 AM	Scheduled
Jul 10, 2023 10:00 AM	Scheduled
Jul 17, 2023 10:00 AM	Scheduled
Jul 24, 2023 10:00 AM	Scheduled

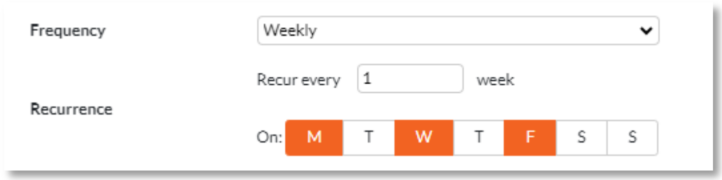
- **Scheduled:** Scheduled Events that are scheduled and have not yet reached their due date will be labeled as "Scheduled." This status indicates that these events are on track and within the planned timeframe.
- **Overdue:** Scheduled Events that have passed their due date without being completed will be marked as "Overdue." This status serves as a clear indicator that these events require immediate attention. These events do however still fall within the events availability timeframe and can still be completed to avoid any delays or potential compliance issues.



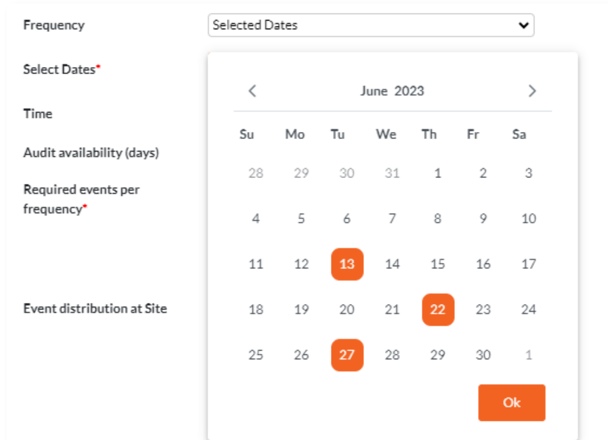
- **Completed:** Scheduled Events that have been successfully finished will be designated as "Completed." This status confirms that the scheduled event has been fulfilled as planned.
- **In Progress:** Scheduled Events that are actively being worked on or are in the process of completion will be marked as "In Progress." This status allows for easy identification of submissions that are currently being addressed but have not yet reached the completion stage.
- **Missed:** Scheduled Events that were not completed by their due date, and are also no longer within the availability timeframe, will be classified as "Missed." Once and event has reached this status, it can no longer be completed and will remain as ‘Missed’.

By automatically categorizing scheduled events with these distinct statuses, you are provided a clear and concise overview of their progress and adherence to deadlines. This enhanced visibility enables better monitoring and management of scheduled events, promoting proactive decision-making and efficient allocation of resources.

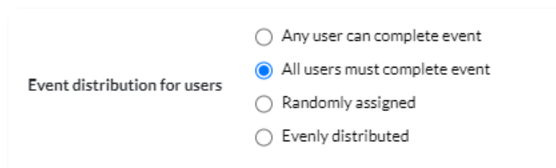
In addition, we have introduced new enhancements to the schedule frequency options. If you choose 'Weekly' frequency, you can now select multiple days per weeks for scheduling, allowing for increased flexibility in planning and execution. Take a look at the accompanying screenshot for a visual representation of this feature.



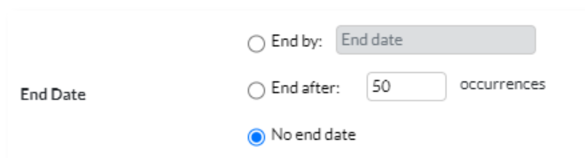
Furthermore, we have added the ability to select specific dates if 'Selected Dates' is chosen as the frequency. This empowers you to precisely schedule on the dates that are most relevant to your compliance requirements and operational needs. It also allows you to schedule event years into the future, using a single schedule.



Alongside the schedule frequency enhancements, we've introduced the feature of 'All users must complete event.' Now, you can create a single schedule and assign it to multiple users, who will each independently be scheduled to complete the event.



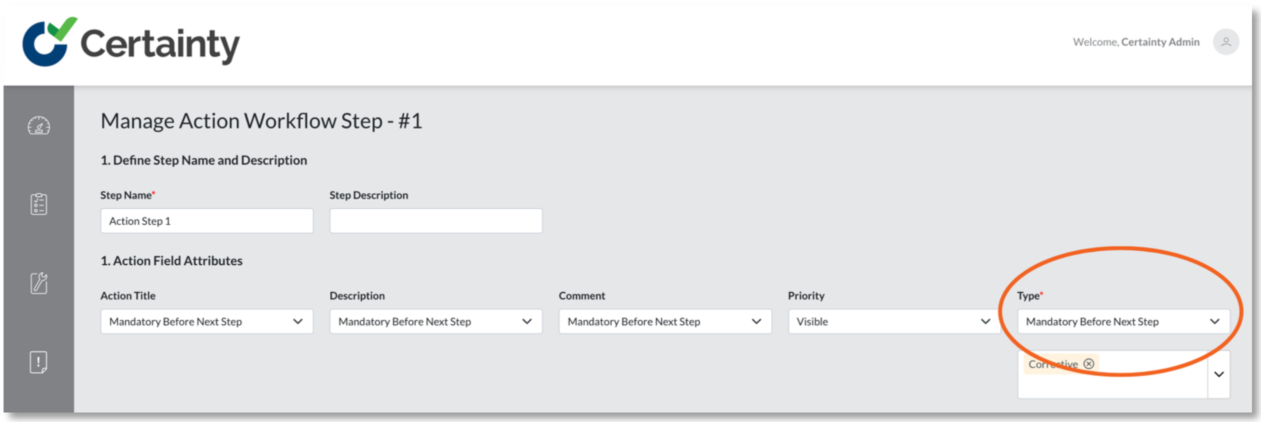
We're also introduce the 'No end date' option. This requested functionality allows you to set up schedules as perpetual, eliminating the need for predefined end dates. Now, you can create schedules that span indefinitely, ensuring continuous monitoring and management of critical events.



These enhancements to the schedule frequency options further streamline the scheduling process, providing you with even greater control and customization. You can now tailor the scheduling of events to align perfectly with your organization's workflows and compliance objectives.

Options for Checklist and Action Workflows

Workflows for both Actions and Checklists are getting an important new feature in the form of 'Mandatory Before Next Step'. This option will allow a user working on a step to save and return to their work without completing mandatory requirements, but still enforce mandatory requirements before the user is allowed to move to the next step within the workflow.

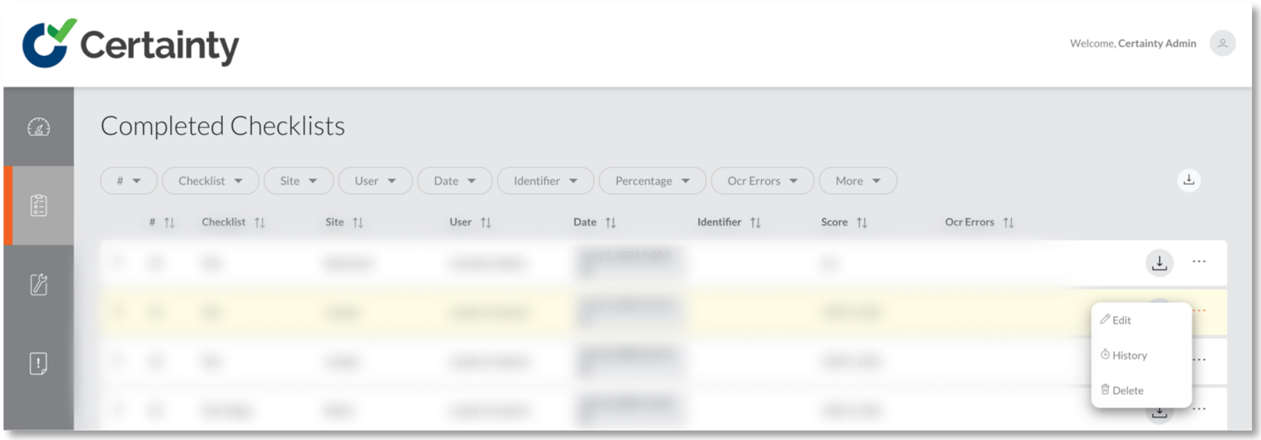


Change History for Completed Checklists

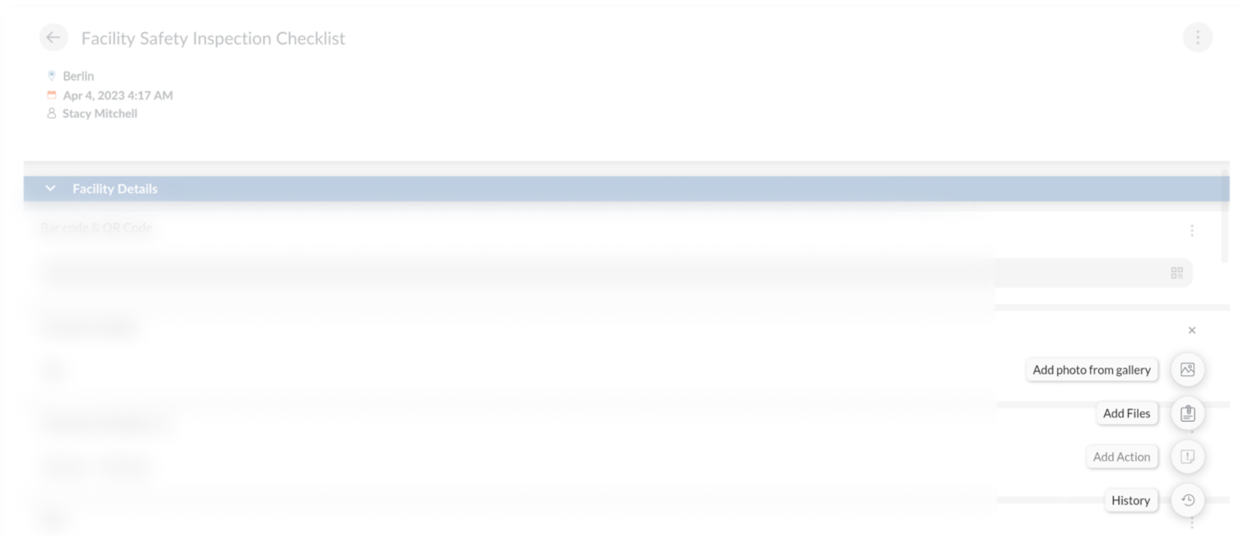
With the latest update, you will have access to a new option on the Completed Checklist page, providing an extensive change history log for that specific submission. This enhancement empowers admins and users to better track the progress and modifications made throughout the lifecycle of a given checklist.

By utilizing the change history feature, you can now gain valuable insights into the work performed on a completed checklist. The change history log captures important information such as modifications to individual answers when these modifications were made as well as which user was responsible for them. This level of detail ensures that you have a comprehensive overview of the actions taken and any updates made to the checklist.

To further enhance usability, the change history feature includes various filters, allowing you to refine the displayed information based on your specific requirements. With the ability to filter by page, question set, answers, and more, you can easily navigate and focus on the areas of interest within the change history log.



This latest update not only introduces the change history feature for the Completed Checklist page but also extends its functionality to the Certainty Software App. When working on a completed checklist, you now have the option to access the change history directly for a specific question. By simply clicking the 3 dots next to a previously completed answer, you can instantly view the change history, gaining valuable insights into the modifications made.



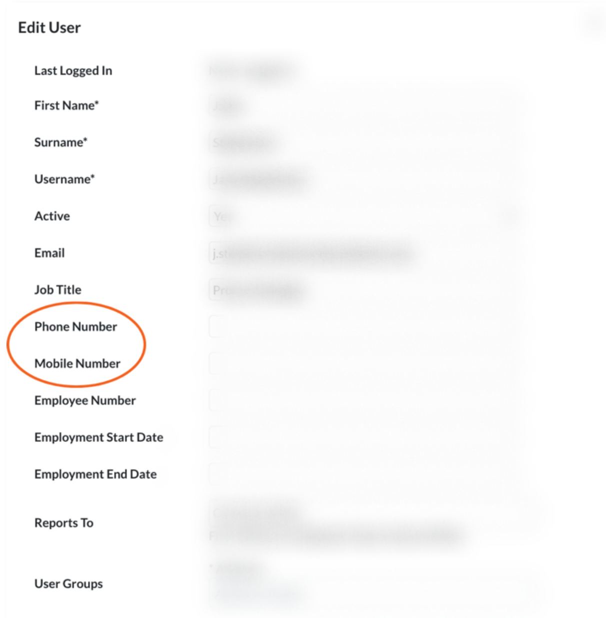
New Optional Fields for User Profiles

With this enhancement, we are introducing the addition of two new fields: Phone Number and Mobile Phone Number.

The inclusion of these fields provides users with the option to include their phone numbers in their profiles. While these fields are optional and do not impact permissions or features within Certainty Software, they offer a convenient way for users to share their contact information if desired.

The Phone Number and Mobile Phone Number fields can be populated by users at their discretion, allowing for seamless communication and contact exchange within your organization. These fields serve as a convenient reference for administrators and team members who may need to reach out to users via phone.

Furthermore, these fields can be integrated into custom reports if requested, providing the opportunity to include phone number details in specific reports as per your reporting requirements. This flexibility ensures that you can customize reports to meet your unique needs and preferences.



View Checklist Question Details While Working on Actions

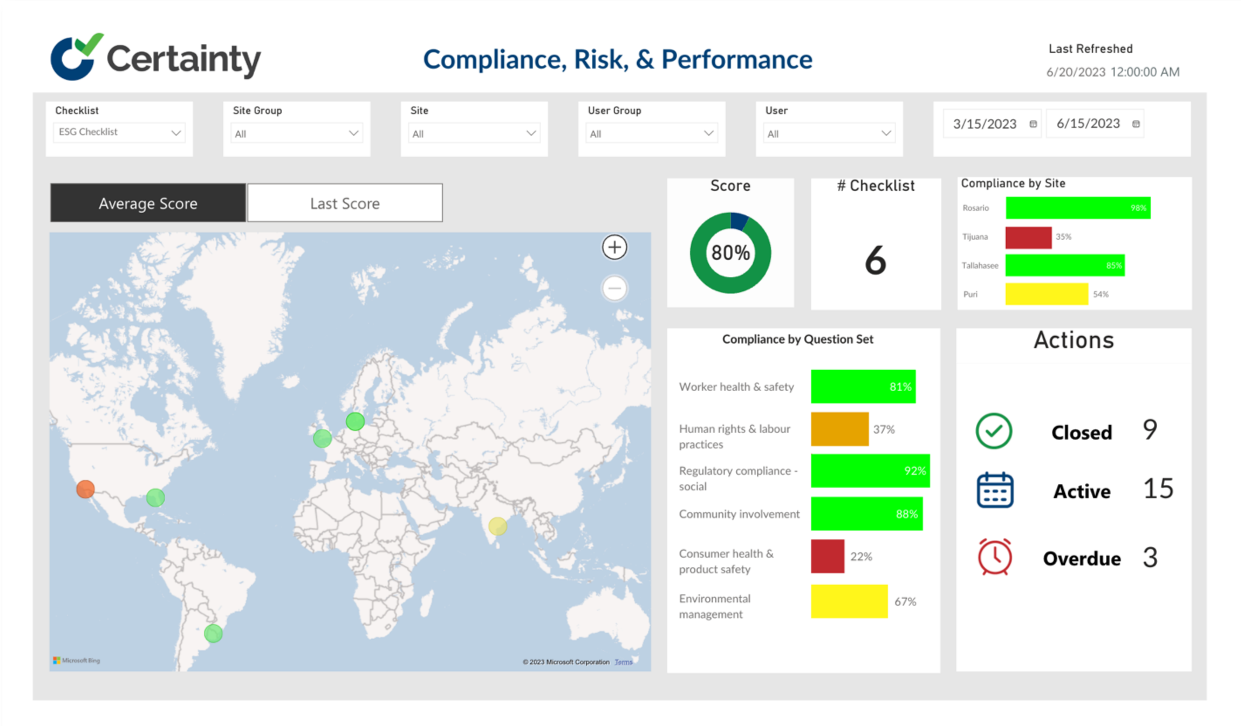
With this latest update, you can now open the question details related to the action, directly from within the action itself, eliminating the need to navigate back to the completed checklist.

This feature provides a seamless and streamlined experience for users. By simply clicking on "Checklist Question Details" in the action edit page within the app or mobile interface, you gain immediate access to the specific question and answer details associated with that action.

Additionally, this feature grants you access to any files and images linked to the question, providing a comprehensive view of the supporting documentation associated with the action.

Compliance, Risk, and Performance Dashboard

We are thrilled to provide you with a sneak peek into an exciting project we are currently working on. Our upcoming Compliance, Risk & Performance Dashboard is designed to give administrators like you even greater visibility and insights into your global site performance, all in one centralized location.



With this new dashboard, you will have a comprehensive overview of key metrics and indicators that help you effectively monitor and assess the performance of your sites. Gain valuable insights into your organization's compliance levels, track question set and question adherence, and have a clear count of Closed, Active, and Overdue Actions, all conveniently presented within a single dashboard.

The Compliance, Risk & Performance Dashboard aims to simplify your monitoring efforts by providing a holistic view of important performance indicators. No more navigating through multiple screens or reports to gather critical information. Everything you need to assess and manage global site performance will be readily available in one centralized location.

Various Bug Fixes

The bug fixes address various issues reported by users, resolving them to ensure that Certainty Software functions optimally. We value your feedback and are committed to addressing any bugs or glitches promptly to maintain the highest quality of our software.

In addition to bug fixes, we have implemented performance upgrades to enhance the speed and responsiveness of Certainty Software. These upgrades aim to optimize system performance, resulting in faster load times, smoother navigation, and improved overall efficiency.