Certainty Software Release Notes

Version 4.5

Certainty Software Version 4.4 Release Notes

Contents

Overview

The 4.5 release of Certainty provides some significant new quality-of-life features for both the Certainty app and the Reporting & Administration (.com) portal. In addition to some more general enhancements and bug fixes, this release improves multilingual functionality for global teams; increases the customizability of your instance of Certainty; and adds of a couple of powerful new features to checklist and action notifications.

New features in this release

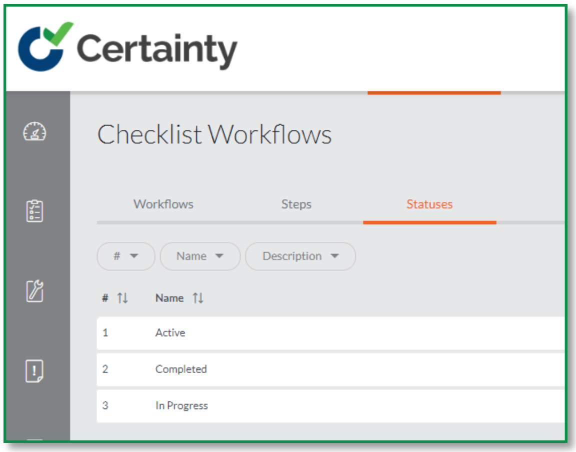
- ✔ Customizable checklist and action workflow step statuses
- ✔ Customizable Overview Tiles in the Certainty app
- ✔ Improvements to checklist and actions notifications
- ✔ Link completed scheduled events to completed checklists
- ✔ User-specific translations for checklist report PDF's
- ✔ Translations for custom fields in actions
- ✔ Various bug fixes

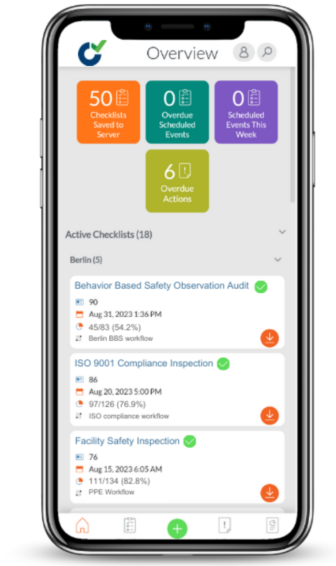
Customizable Workflow Step Statuses

In previous versions of Certainty, your options for workflow step statuses were limited to 'Active' and 'Completed.' However, with this latest release, you can customize your own checklist and action workflow steps statuses. This means you now have the flexibility to create your own step statuses and then filter and report checklists and actions based on the status of the workflow step they are in.

Implementation of workflow step statuses means that if you have associated either a checklist or an action with a workflow, you will now be able to filter, report, view and manage them based on the status of the workflow step they are in.

The implementation of this feature will be in 2 phases and in this release, we have added the ability to create / customize workflow step statuses and included workflow step status to the summary view of checklists and actions in the Certainty app.





In phase 2 of this feature development, checklist and action workflow step status will be added to grid filters, report parameters and app Tiles so you will be able to easily find, report and manage checklists and actions based on the status of the workflow step they are in.

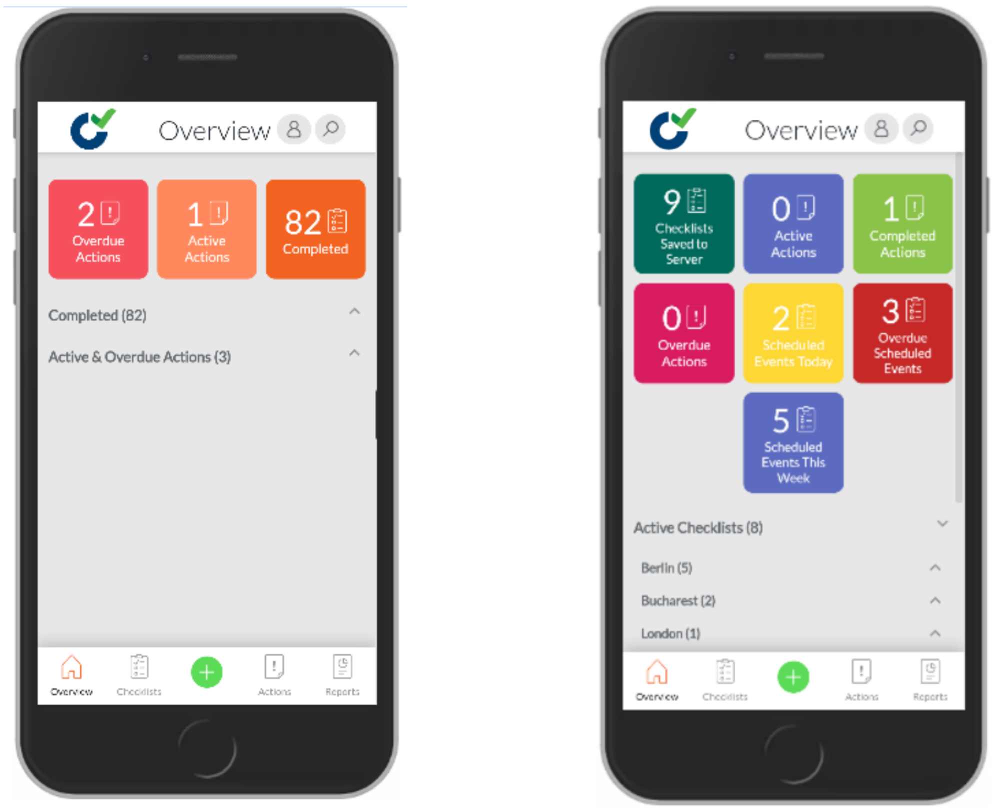
Customizable Overview Tiles in the Certainty App

In previous versions, the Certainty app only allowed for three performance data Tiles on the Overview tab. Version 4.5 allows you to customize the number of Tiles you see on your Overview tab and even customize Tile colors to suite your style.

New Tile options are:

- ✔ Checklists Saved to Server
- ✔ Draft Checklists
- ✔ Checklists Not Saved to Server
- ✔ Overdue Scheduled Events
- ✔ Scheduled Events Today
- ✔ Scheduled Events This Week

The option to add multiple Tiles to your Overview tab means you can define the key performance metrics that are most relevant to you and provide for quick and easy click-through to the checklists and actions that are most important to you.



Certainty app Overview Tiles before and after

Improvements to Checklist & Actions Notifications

Notifications Triggered by a Workflow Step Change

In this release we have added the ability to trigger notifications when a checklist or action moves from one workflow step to another.

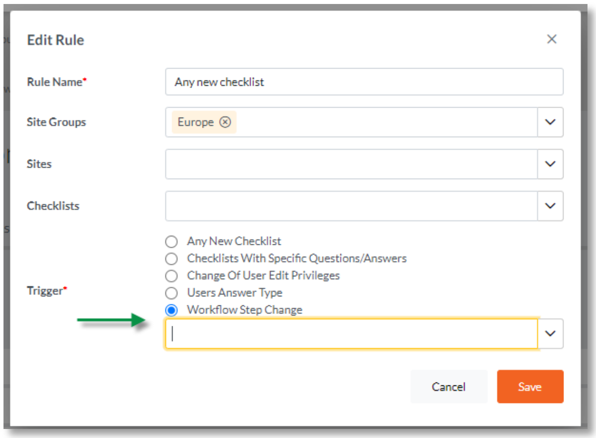
Previously checklist notification rules could be triggered by things like completing a new checklist, specific answers in a checklist and action notifications could be triggered by things like creating a new action, action due in X days, action overdue, etc.

Now, notifications can also be triggered - for both checklist and action notifications - when they move to a new step in a workflow. This means you can now automatically send email notifications to users (i.e., work colleague, supplier, boss, etc.) who becomes responsible for a checklist, or an action based on the workflow step it has moved to.

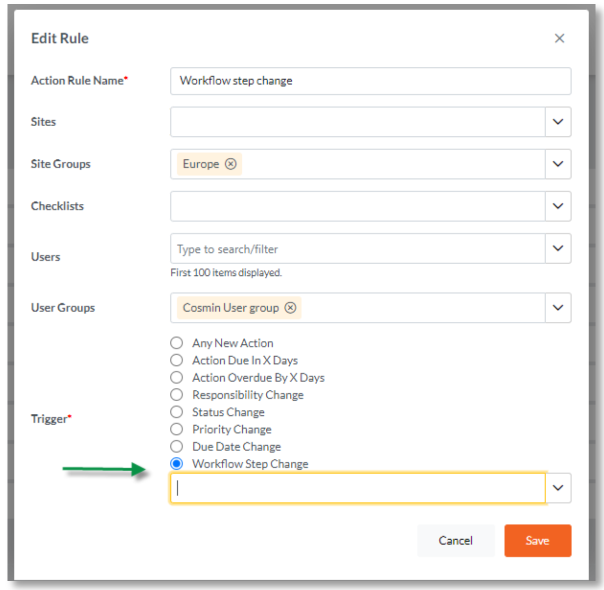
For example, notify a supplier that their compliance or quality assurance audit has been complete by your team but there are corrective actions that they now need to address; or notify an audit team member, perhaps a reviewer or approver - that you have completed your part of an audit, and now its their turn to do theirs.

Using this feature, you can now make the hand-off of an audit from one auditor to the next smooth and seamless; or ensure that corrective actions are managed from identification to closure across your entire business - the possibilities are endless and powerful!

Checklist Notification Rule



Action Notification Rule

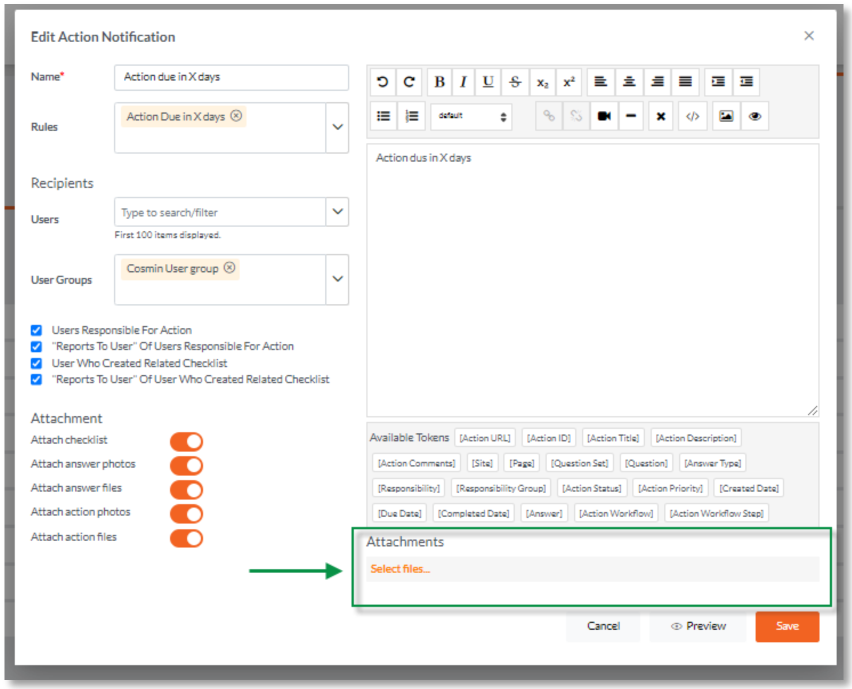


Improved Notification Set Up Interface & Add Attachments to Notifications

Release 4.5 brings improvements to both the user interface for creating - and functionality of - checklist and action notifications in Certainty.

Previously when creating automated notifications in Certainty, you could attach to checklist notifications things like completed checklist report PDFs and the photos and files included in completed checklist answers and you could choose to attach the photos added to an action-to-action notifications.

Now, when creating either checklist and/or action notifications, version 4.5 enables you to also attach files (PDF, images, documents, etc.) to the actual notification sent.



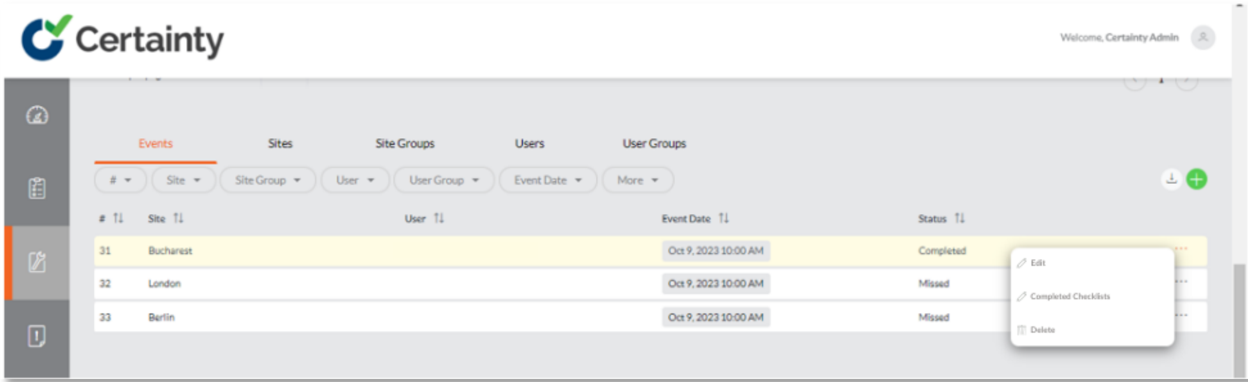
Sounds simple, but the use cases are vast and powerful and ensure you (and your team, co-workers, suppliers, etc.) have all they need, when they need it, to do what is required when they receive notifications from Certainty.

Whether it's attaching Certainty login credentials and Getting Started instructions to notifications you send to suppliers; or adding procedures or reference material to corrective action notifications for your own team, you can now include the additional communication, instructions, procedures, or documents needed to your notifications ensuring everyone has what they need, when they need it to reduce risk, ensure compliance and improve performance.

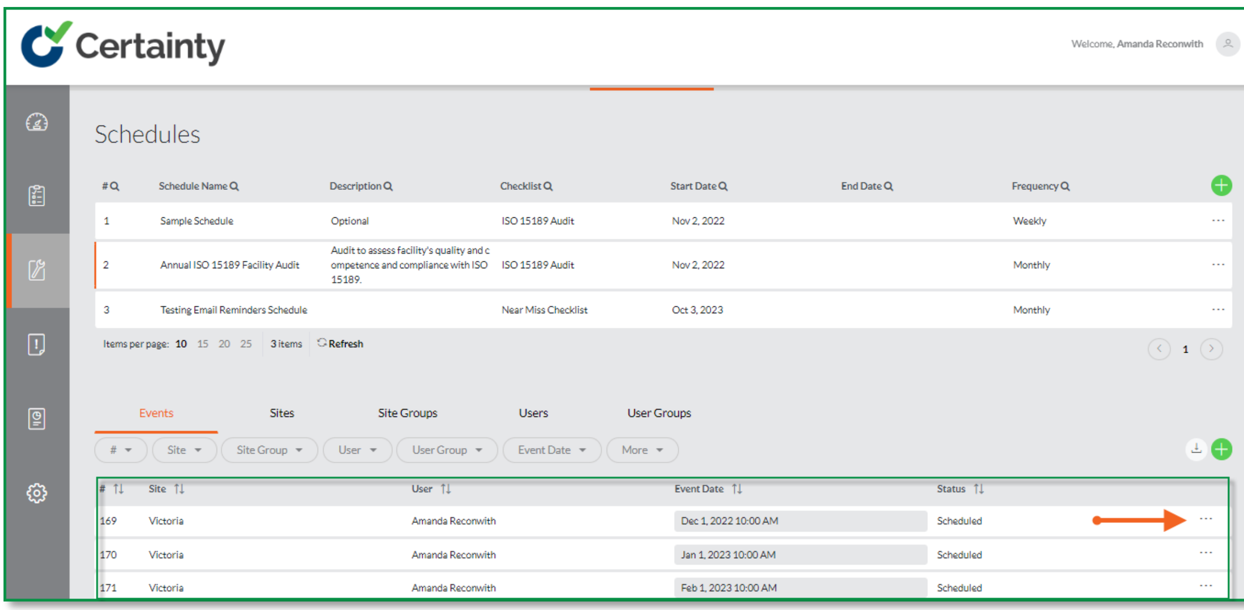
Link Completed Scheduled Events to Completed Checklists

In the Checklist Schedule tool (in the Reporting & Administration portal), a checklist schedule shows the events (i.e., scheduled audits, inspections, etc.) included in that schedule as well as the site the event is schedule at, the user the event is scheduled to, the date of the scheduled event and status (scheduled, In Progress, Overview, or Missed) of each event scheduled.

In this release we have added the ability to click through to the checklist linked to a completed scheduled event.



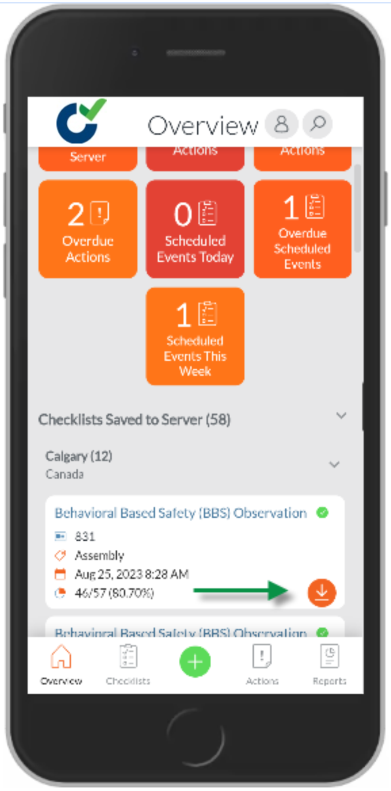
This small but significant enhancement ensures that you can easily and accurately connect completed checklists with their corresponding schedules and completed events, bringing a new level of clarity and traceability to your Certainty experience.



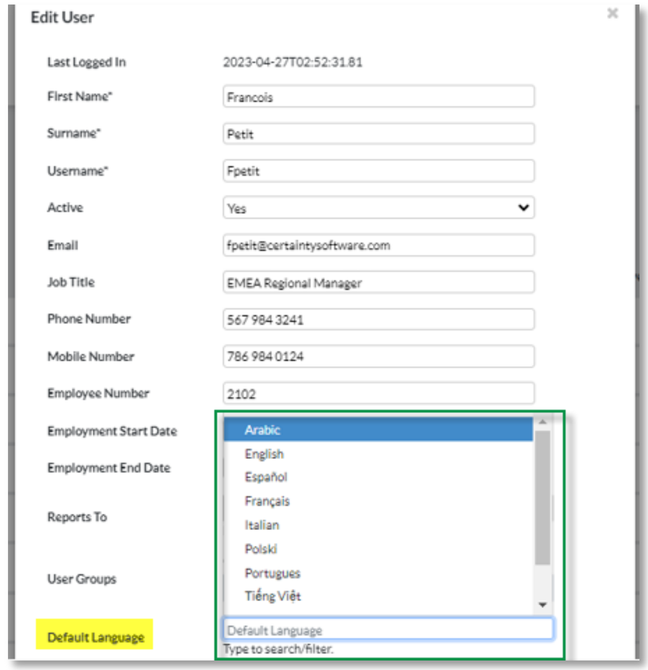
User-specific Translations for Checklist PDF Reports

Driven by valuable user feedback, we've introduced a couple of great features that promise to make the Certainty experience even better for your multilingual teams. Now, you can specify the 'Default Language' of Certainty users and ensure that checklist report PDFs they download in the app or receive through automated Certainty checklist notifications, will be delivered to them in their own language.

That's right, if translations are linked to a checklist in your instance of Certainty, then the PDF checklist report you can download in the Certainty app (and Reporting & Admin portal) will automatically be translated to the default language of the device of the user downloading the PDF. Better still, if a PDF checklist report is included in any Certainty checklist notifications sent to a user, the PDF report will automatically be translated to their default language as selected in their user profile.



Checklist report PDF download in Certainty app

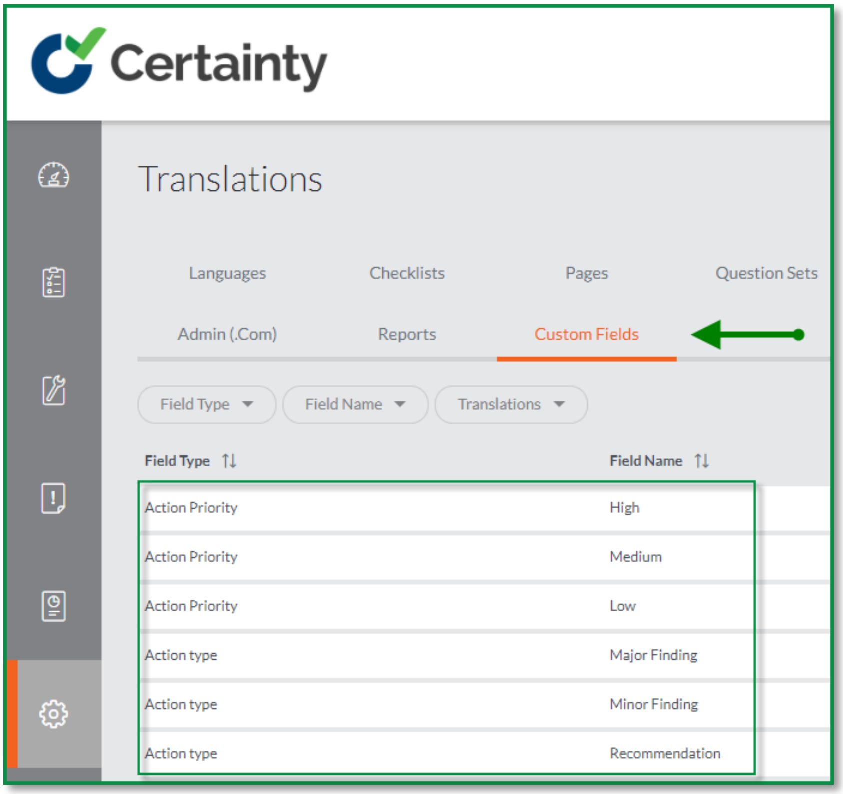


Default language setting in user profile

This means that your communication transcends language barriers. No matter where your users are or what language they prefer, this ensures that checklist report PDFs they use will be delivered to them in their preferred language.

Translations for Custom Fields in Actions

To improve the usefulness and flexibility of Certainty's actions tool across a multilingual team, this release allows for the addition of translations for the customizable Action Type and Action Priority fields in Certainty actions. This enhancement means you know everyone is talking the same action management language, whatever their language is!



Various Bug Fixes

A few minor bugs have also been addressed in this release.

Thank you for your continued input on the Certainty platform and if you have any product issues or ideas for new features, we always welcome your feedback!