Certainty Software Release Notes

Version 4.7.1.1

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Contents

Overview

We're excited to announce the release of version 4.7.1.1, bringing several powerful new features and enhancements to improve user access management, checklist workflows, and overall usability.

Below is a summary of what's new:

New features in this release:

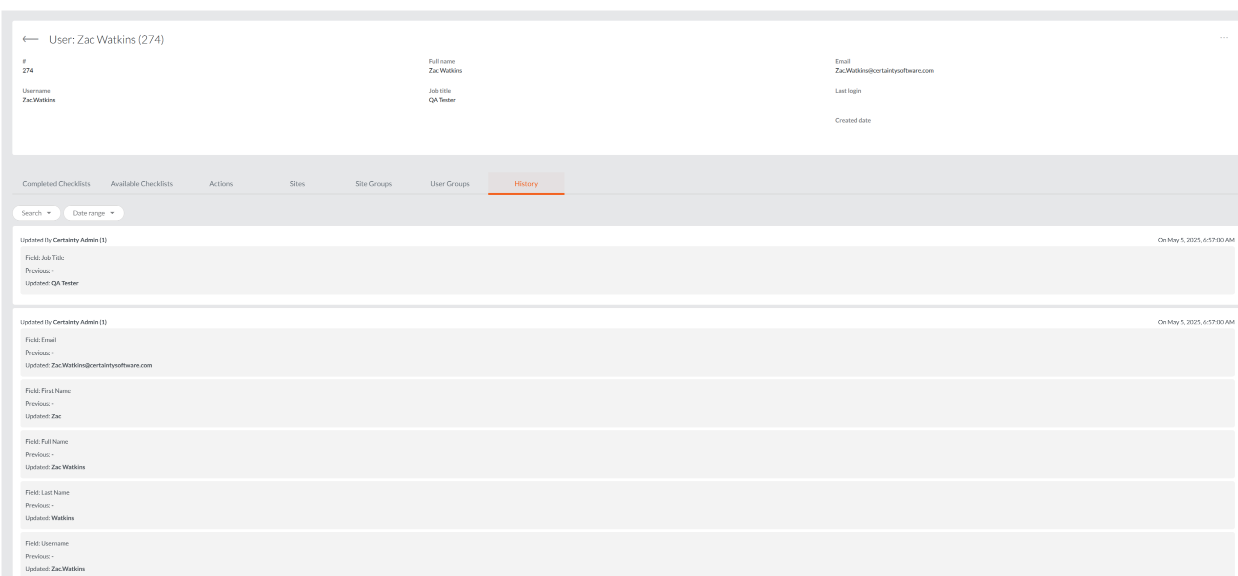
- ✔ History tracking and tools for Users and Sites
- ✔ Critical Answer Options for scoring Checklists
- ✔ Action Checklists
- ✔ Improved filters and tiles for the App and .mobi
- ✔ Improved Workflow Notifications and visibility
- ✔ Bug fixes and ease of use improvements

User Access Management and Control Report

A new system report is now available that provides a comprehensive overview of user access. This includes sorting by site access and user roles, as well as visibility into user creation dates, most recent logins, and detailed work history. This new report can be found under the Reports tab. From here, go to System Reports, where you'll find the new User Access Management and Control report.

History Tracking Enhancements

The system now tracks changes in Completed Checklists, Users, User Groups, Sites, and Site Groups, allowing for greater transparency and auditability across your organization. This can be accessed by clicking the item from the list in the admin portal to bring up the focus menu and then selecting the History tab.



Custom Overview Tiles in App and .mobi

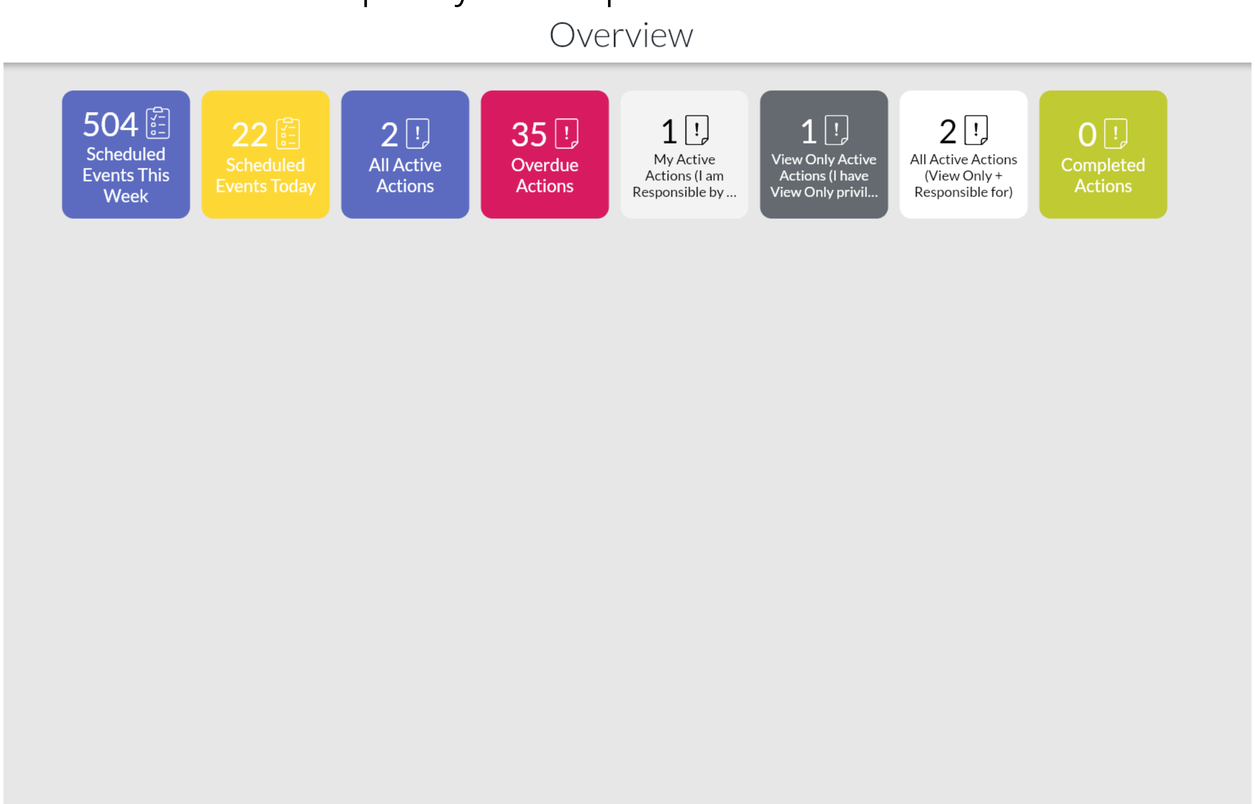
Users can now create custom Overview tiles based on filters they define, making it easier to monitor key data and jump directly into relevant tasks.

To create custom tiles or edit the ones currently present:

1. navigate to the Overview menu of the App or mobi
2. select the profile menu from the top left
3. click Edit Overview Tiles, or click and hold on any tile to activate the add and edit options

This will allow you to edit or remove existing tiles with the dot menu (…) and add new tiles with the 'Add Tile' button that will now appear at the top. The new tile will be a filter based on Actions, Checklists, or Schedules, and you will need to assign it a name and parameters before saving your filter selection by clicking the Save icon in the top right corner. Clicking a tile will navigate to a focus menu filtered according to your saved filter options.

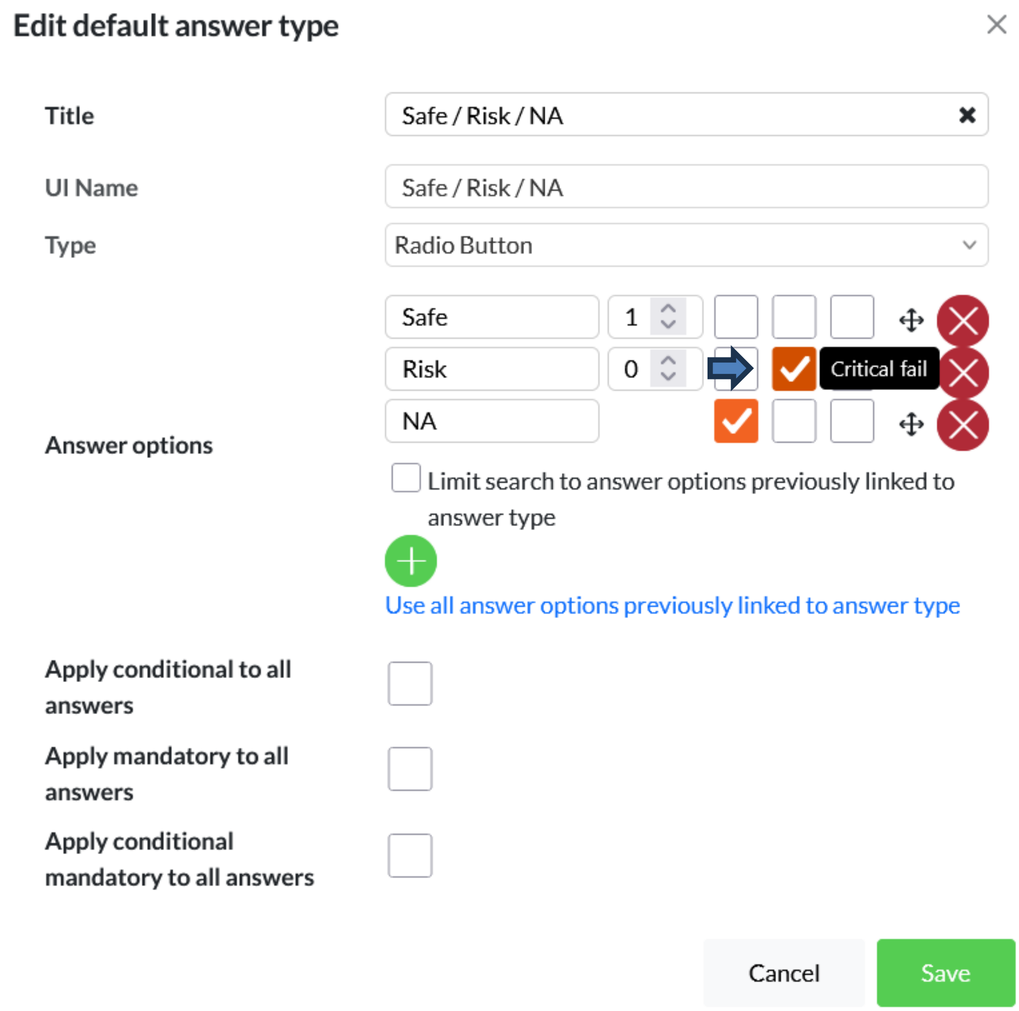
Tiles are unique to your user profile and cannot be translated



Critical Fail Answer Flags

Admins can now designate specific Answer Options as "critical" when building Checklists. If answers flagged as critical are selected during submission, the Checklist will automatically fail, regardless of the overall score. This critical fail will be displayed on both the default PDF download as well as the cards in your Checklist's menu and filters on the App and mobi.

Select the Critical fail tick box while editing the Answer Type

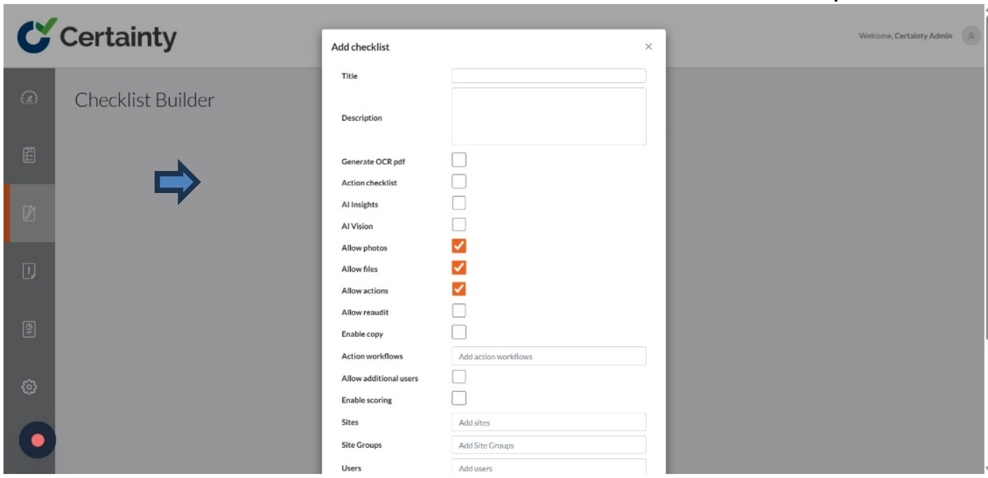


Action Checklists

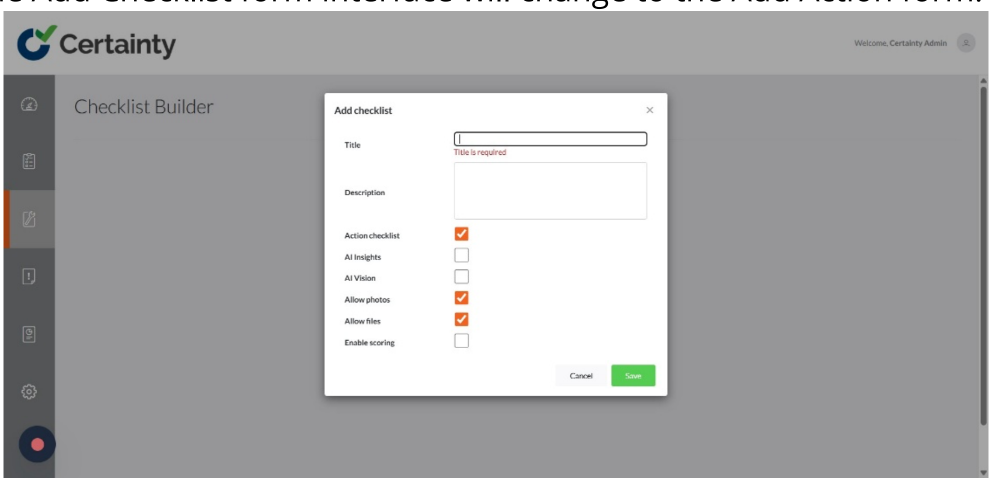
Action Checklists can now be enabled from the Checklist Builder, allowing you to create Actions that contain custom text fields, questions, and descriptions just like a normal Checklist. These Action Checklists are then enabled by assigning them to a custom Action Type.

When a user completes a checklist in the app or .mobi, creates an action, and selects (or is assigned through workflows or checklist rules) that action type, they will be prompted to fill out the attached action checklist.

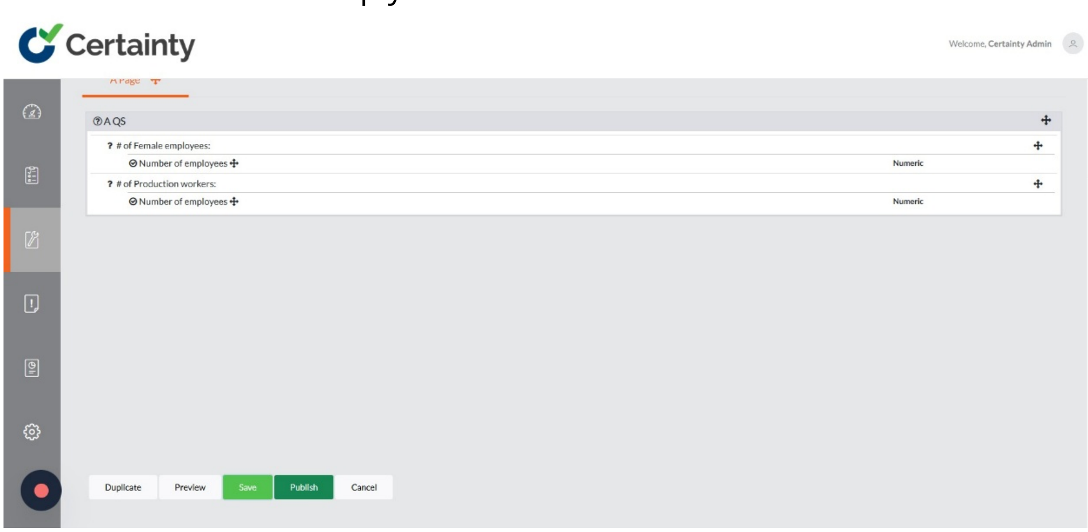
Create a Checklist and select the Action Checklist option.



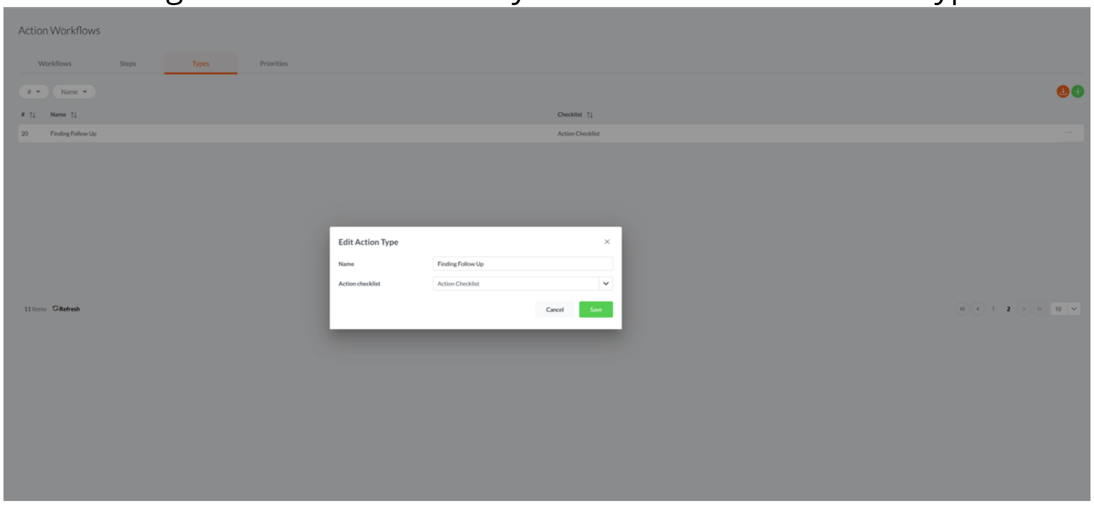
The Add Checklist form interface will change to the Add Action form.



Set up your custom Action Checklist



Assign the Action Checklist you have built to an Action Type



Enhanced Workflow Visibility

On Checklist submissions that are part of a Workflow, the Workflow description and Step description are now clickable pop-ups, accessible directly from the header for improved context.

Extended User Assignment Setting

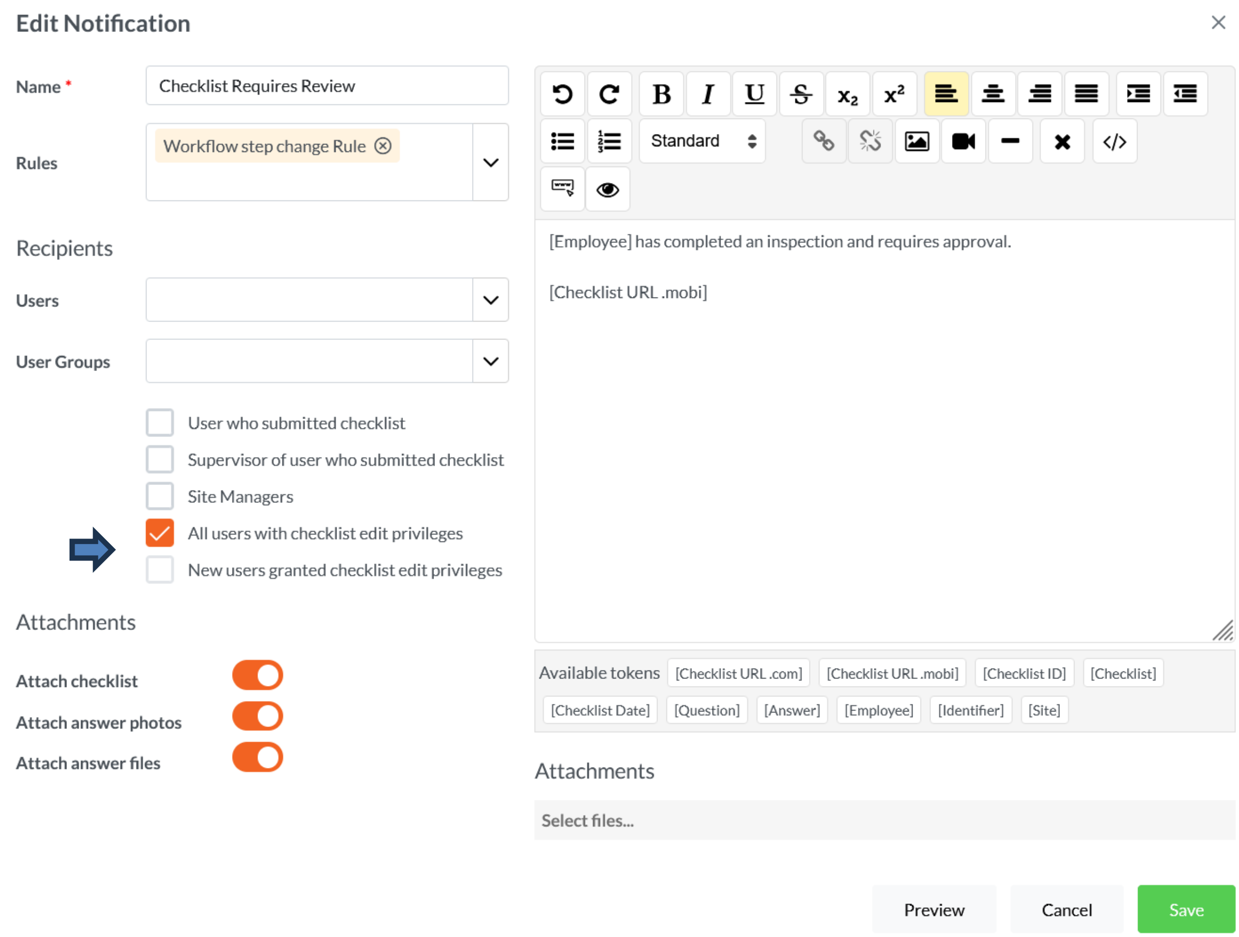
A new optional setting—available upon request—allows users to be assigned to Sites even if they do not have direct access, providing greater flexibility in team roles and assignments. Instances are by default set to Action responsibility being restricted by site access.

Contact Certainty support if you would like the setting to be changed.

Improved Notification Routing in Workflows

Notifications for Checklist Steps within a Workflow can now be configured to notify all responsible users, or only those newly assigned. These options are available when setting up a Notification where the associated Rule is attached to a Workflow.

Selecting 'All users with checklist edit privileges' will send the Notification to all users with responsibility for the Workflow Step, while selecting 'New users granted checklist edit privileges' will *only* send the Notification to users attached to the Checklist during the Workflow Step change.



Various Bug Fixes and Ease of Use Improvements

Usability improvements as well as a variety of minor bugs have also been addressed and fixed 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!