



Certainty Software Release Notes

Version 4.7.1.1

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Contents

- Overview 1
- User Access Management and Control Report 1
- History Tracking Enhancements 1
- Extended User Assignment Setting 5
- Improved Notification Routing in Workflows 5
- Various Bug Fixes and Ease of Use Improvements..... 6

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.

← User: Zac Watkins (274)			
#	Full name	Email	
274	Zac Watkins	Zac.Watkins@certaintysoftware.com	
Username	Job title	Last login	
Zac.Watkins	QA Tester		
	Created date		
Completed Checklists Available Checklists Actions Sites Site Groups User Groups History			
Search ▾ Date range ▾			
Updated By Certainty Admin(2) On May 5, 2025, 6:57:00 AM			
Field: Job Title			
Previous: -			
Updated: QA Tester			
Updated By Certainty Admin(2) On May 5, 2025, 6:57:00 AM			
Field: Email			
Previous: -			
Updated: Zac.Watkins@certaintysoftware.com			
Field: First Name			
Previous: -			
Updated: Zac			
Field: Full Name			
Previous: -			
Updated: Zac Watkins			
Field: Last Name			
Previous: -			
Updated: Watkins			
Field: Username			
Previous: -			
Updated: Zac.Watkins			

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

Overview



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

Edit default answer type



Title	<input type="text" value="Safe / Risk / NA"/>				
UI Name	<input type="text" value="Safe / Risk / NA"/>				
Type	<input type="text" value="Radio Button"/>				
Answer options	Safe	1	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Risk	0	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	NA		<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/> Limit search to answer options previously linked to answer type				
	<div><div>+</div><div>Use all answer options previously linked to answer type</div></div>				
Apply conditional to all answers	<input type="checkbox"/>				
Apply mandatory to all answers	<input type="checkbox"/>				
Apply conditional mandatory to all answers	<input type="checkbox"/>				

Cancel

Save

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 screenshot shows the Certainty Checklist Builder interface. A modal window titled 'Add checklist' is open. It contains the following fields and options:

- Title: Text input field
- Description: Text area
- Generate OCB pdf: ☐
- Action checklist: ☐ (This option is selected in the original image)
- AI Insights: ☐
- AI Vision: ☐
- Allow photos: ☒
- Allow files: ☒
- Allow actions: ☒
- Allow resaudit: ☐
- Enable copy: ☐
- Action workflows:
- Allow additional users: ☐
- Enable scoring: ☐
- Sites:
- Site Groups:
- Users:

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

The screenshot shows the Certainty Checklist Builder interface with the 'Add checklist' modal window. The 'Action checklist' option is now selected, and the form has been updated to show the following fields and options:

- Title: Text input field with a red error message 'Title is required' below it.
- Description: Text area
- Action checklist: ☒
- AI Insights: ☐
- AI Vision: ☐
- Allow photos: ☒
- Allow files: ☒
- Enable scoring: ☐

At the bottom of the modal are 'Cancel' and 'Save' buttons.

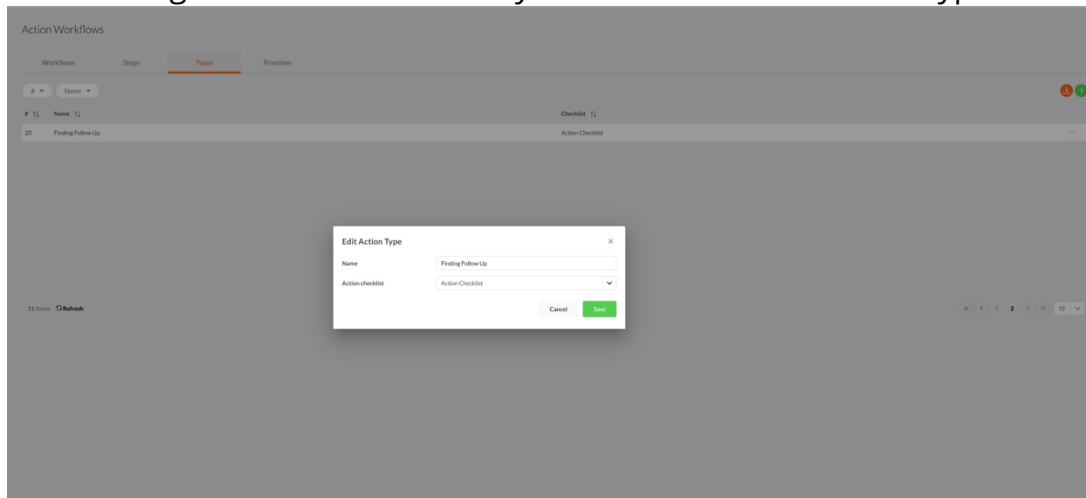
Set up your custom Action Checklist

The screenshot shows the Certainty interface with a custom Action Checklist setup. The 'AQS' (Action Query Set) section is visible, showing a list of items with their respective data types:

Item	Data Type
7 # of Female employees:	
@ Number of employees +	Numeric
7 # of Production workers:	
@ Number of employees +	Numeric

At the bottom of the interface are buttons for 'Duplicate', 'Preview', 'Save', 'Publish', and 'Cancel'.

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.

Edit Notification

Name * Checklist Requires Review

Rules

Workflow step change Rule

Recipients

Users

User Groups

- ☐ User who submitted checklist
- ☐ Supervisor of user who submitted checklist
- ☐ Site Managers
- ☒ All users with checklist edit privileges
- ☐ New users granted checklist edit privileges

Attachments

Attach checklist

Attach answer photos

Attach answer files



Rich text editor toolbar with icons for undo, redo, bold, italic, underline, strikethrough, subscript, superscript, bulleted list, numbered list, indent, outdent, link, unlink, insert image, insert video, horizontal line, insert table, and source code.

Standard

[Employee] has completed an inspection and requires approval.

[Checklist URL .mobi]

Available tokens: [Checklist URL .com] [Checklist URL .mobi] [Checklist ID] [Checklist] [Checklist Date] [Question] [Answer] [Employee] [Identifier] [Site]

Attachments

Select files...

Preview

Cancel

Save

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!