

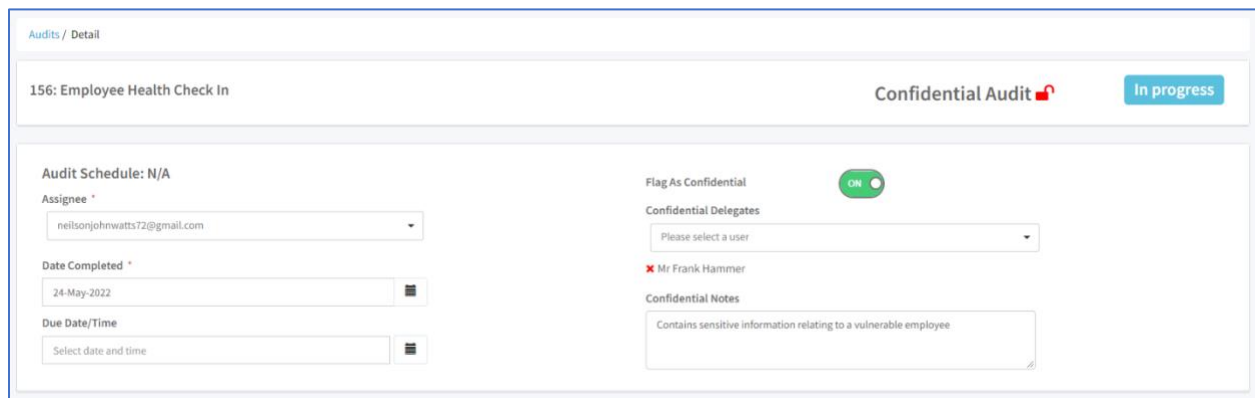
# Notify Cloud - v5.12 Release Notes

Please find the release notes for Notify Cloud - v5.12 which is scheduled for release on 22nd June 2022.

## Confidential Audits

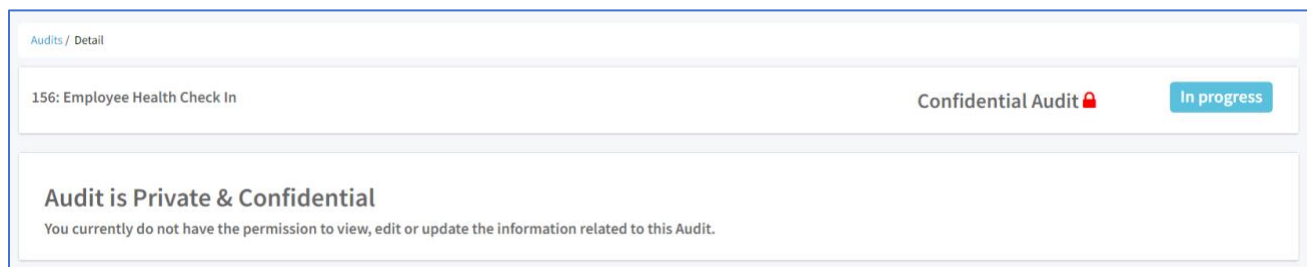
We have enhanced our Audits module to include the ability to mark an Audit as Private & Confidential so that only authorised Notify users with the correct permissions are able to view and manage the Audit.

**Note:** Only Department Audit and Company Audit Managers can flag an Audit as Confidential. As well as the new Confidential Audit Manager permission group.

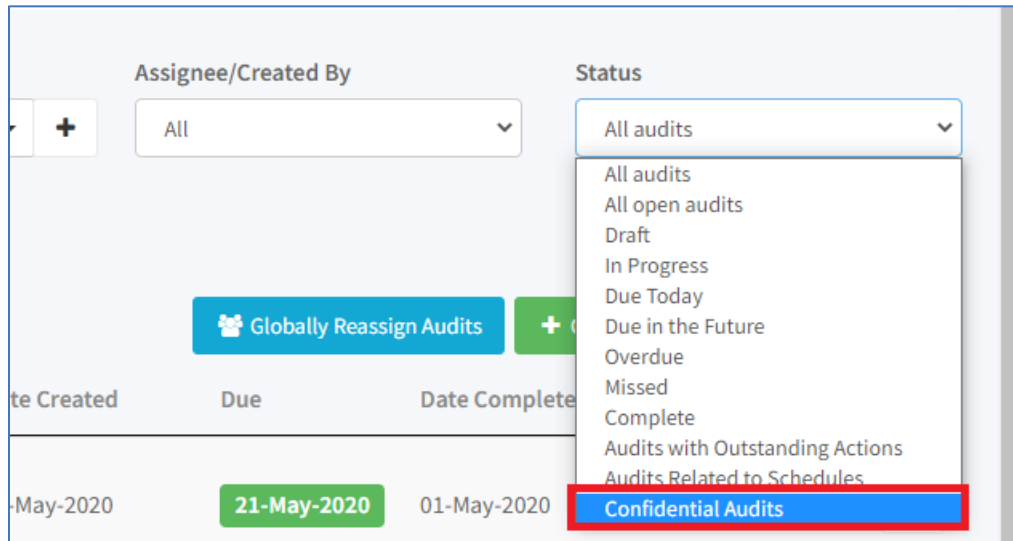


Once an Audit is marked as Confidential, a user who does not have the permission to view the Audit detail will see the following:

**Note:** only the Assigned Auditor, Confidential Delegates and users with the Confidential Audit Manager permission groups will be able to view Confidential Audit.



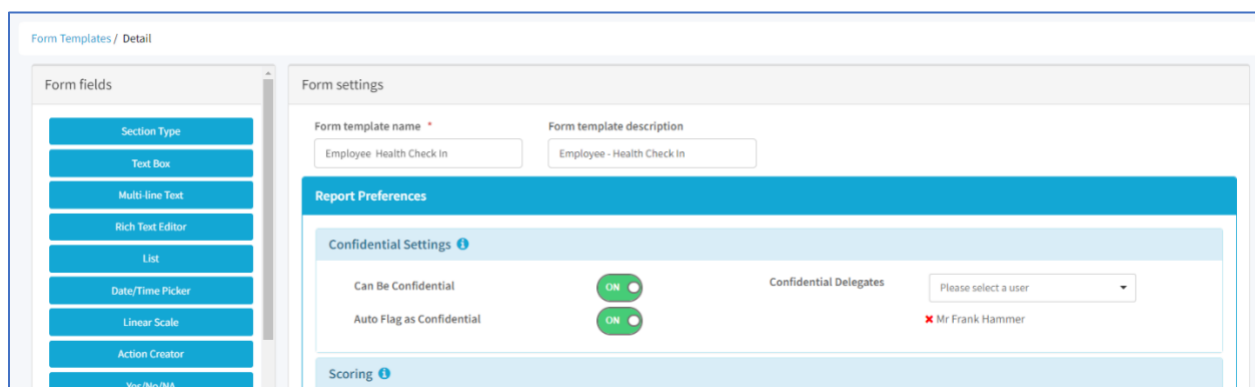
We have added Confidential Audits selection within the Status Filter to quickly filter all audits flagged as confidential.



### Audit Form Template > Confidential Report Preferences

You can also configure the Form Template to drive the relevant Confidential Settings on a template-by-template basis:

- **Can be Confidential** - empowers the Assigned Auditor to flag whether the Audit is Confidential
- **Auto Flag as Confidential** - will automatically flag the Audit as Confidential
- **Confidential Delegates** - enables you to control at the Form Template Level any other users you would like by default to have access to the Confidential Audit



## CSV Export of Confidential Audits

Confidential Audits information will only be visible in the CSV Export for Audit data if you have the right permissions. So, for example:

- Where a user has permission to view all Confidential Audits, then they will be able to see all data in the CSV Export.
- Where a user only has permissions to view only one Confidential Audit, then will only be able to see the sensitive data for the Confidential Incident they have access to in the CSV Export.
- Where the user has no permissions to view Confidential Audits all sensitive and private data will be replaced by “Confidential” in the CSV Export.

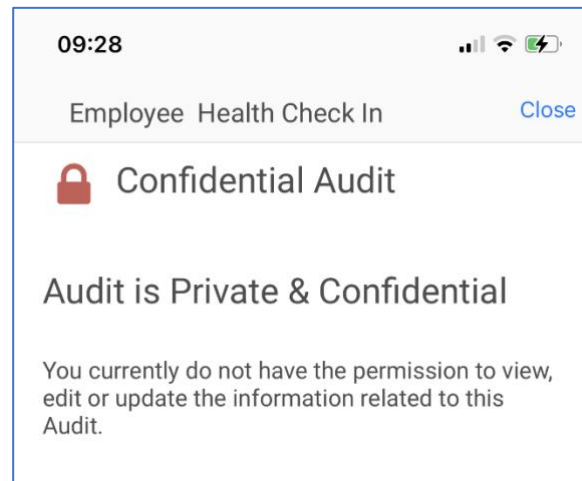
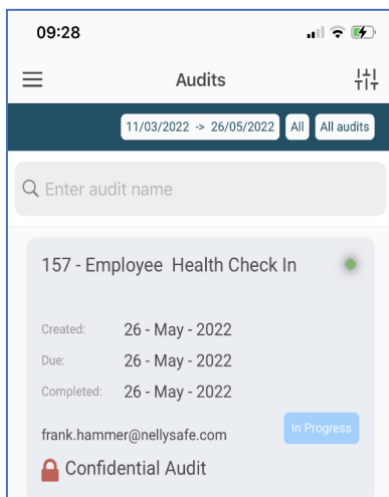
P	Q	R	S	T	U
Employee Full Name	Employee Number	Has the employee returned to work?	How is there general wellbeing?	On a scale of 1 to 10 how are they feeling?	Linked Records
Confidential	Confidential	Confidential	Confidential	Confidential	

## Globally Reassign Audits

It is important to note that Globally Reassigning Audits (for example when a user has left the business and you want to reassign an audit to another user) will not support reassigning Confidential Audits. These must be reassigned within the Audit on a case-by-case basis.

## Notify AI Mobile App (IOS and Android) > Confidential Audits

The Notify A&I App will initially only support whether you are able to view or manage a Confidential Audits based on the permissions the user has or the confidential settings from the Form Template.



## Audit Form Templates > Section Level RAG Grading

We have enhanced Audit Scoring by enable you to configure whether you want to display RAG grades (as Red, Amber or Green) on a section-by-section basis.

**Note:** the sections will use the same percentage thresholds used on the overall RAG Grading of the Audit Report.

**Report Preferences**

**Confidential Settings**

Can Be Confidential  OFF

**Scoring**

Enable scoring  ON

Display numeric score  On

Display percentage score  On

Enable section scoring  ON

Hide scores on PDF export  OFF

Hide scores on view Audit  OFF

Display RAG Status  ON

Display section RAG status  ON

Bad	Good	Excellent	Maximum Score
-	70 %	85 %	100%
-	2	3	3

Please use the percentage thresholds as your reference point when comparing the grade score on Audits

When you view the Audit, the sections will clearly include their RAG Grading.

**Audit Details - Cleaning Inspection**

**Bedroom**  
Bedroom  
How clean is this room?  
Dirty Average Clean Not applicable  
1/1 (100%) Excellent

**Kitchen**  
Kitchen  
How clean is this room?  
Dirty Average Clean Not applicable  
1/1 (100%) Excellent

**Bathroom**  
Bathroom  
How clean is this room?  
Dirty Average Clean Not applicable  
-1/1 (-100%) Bad

On exporting the Audit to PDF, each section will clearly include the Section Score and RAG Grading.

<b>Bedroom</b>	<b>Section Score: 1/1 (100%)</b>
	<b>Section Grade: Excellent</b>
Bedroom	
How clean is this room?	
Clean	
<b>Kitchen</b>	<b>Section Score: 1/1 (100%)</b>
	<b>Section Grade: Excellent</b>
Kitchen	
How clean is this room?	
Clean	
<b>Bathroom</b>	<b>Section Score: -1/1 (-100%)</b>
	<b>Section Grade: Bad</b>
Bathroom	
How clean is this room?	
Dirty	

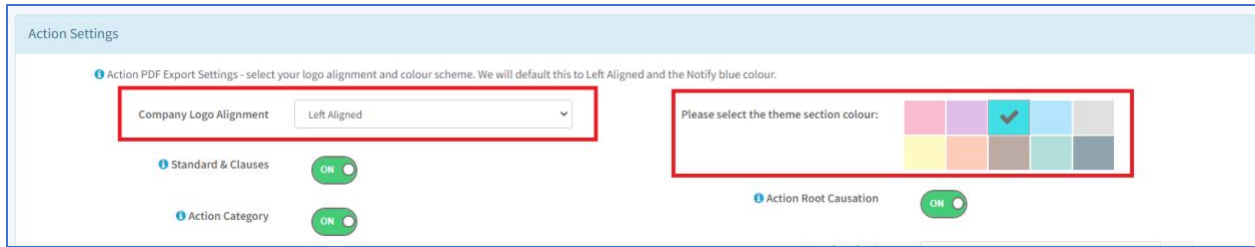
We also include a Report Scoring Summary within the Audit PDF Export.

<b>Report Scoring Summary</b>		
<b>Section</b>	<b>Section Score</b>	<b>Section Grade</b>
Bathroom	-1/1 (-100%)	<b>Bad</b>
Bedroom	1/1 (100%)	<b>Excellent</b>
Kitchen	1/1 (100%)	<b>Excellent</b>

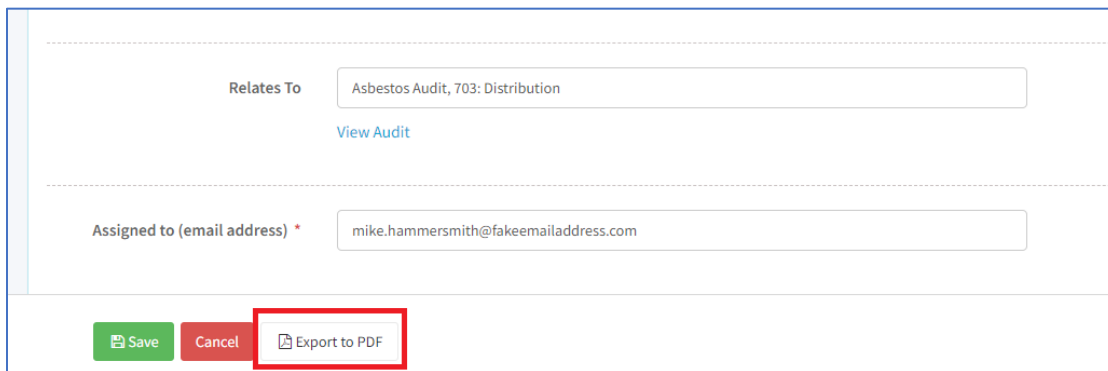
## Action Tracking Module

Actions > Export Action to PDF

In My Company Settings, you can configure some basic settings for the Action PDF Export such as Logo Alignment and the relevant colour scheme.



Whilst managing the Action on the Action toolbar at the footer of the screen, you will see an Export to PDF button.



On clicking Export to PDF, your Action Summary Report will appear.

nellysafe.com	
Action Summary Report	
<b>Action No.</b>	35
<b>Assignee</b>	mike.hammersmith@nellysafe.com
<b>Location</b>	Distribution
<b>Status</b>	Done
<b>Priority</b>	Lowest
<b>Due Date</b>	27-May-2020
<b>Completed Date</b>	23-May-2022
<b>Verified Date</b>	23-May-2022
<b>Confidential</b>	No

## Risk Assessments Module

### Form Template > Risk Assessments - Configure eSignature

We have enhanced our Risk Assessment module to include the ability to capture e-Signature, the date and time stamp of when the signature was recorded and the geo-tagged location.

**eSignature Settings**

Enable eSignatures

Section title \*

Supporting Text 

This Risk Assessment was completed and reviewed by the following individuals

*Configure the placeholder text in these fields*

Completed By

Completed by required

Approved by

Approved by required

*Configure whether you want to capture the date & time, and location of where the signature was taken*

Date & Time Stamp

Geo Tag


### Risk Assessments > Completing & Reviewing a Risk Assessment

Once you have configured your eSignature settings for Risk Assessments, when Completing and Reviewing the Risk Assessment you can capture the digital signature.

**Completed & Reviewed By**

This Risk Assessment was completed and reviewed by the following individuals

Completed By:



Signature captured: 23 May 2022 3:56:47 PM  
Geotagged location: 54.8765696, -1.4352384

Approved by:



Signature captured: 23 May 2022 3:57:21 PM  
Geotagged location: 54.8765696, -1.4352384

### Risk Assessments > Add / Edit / Remove Comments

We have included the ability to add, edit and remove Comments to Risk Assessments.

Activities (4)   Comments (0)   Actions (0)   Linked Records (3)

**No comments**

Risk Assessment is been reviewed and approved.

## Risk Assessments > Department Risk Assessment Manager

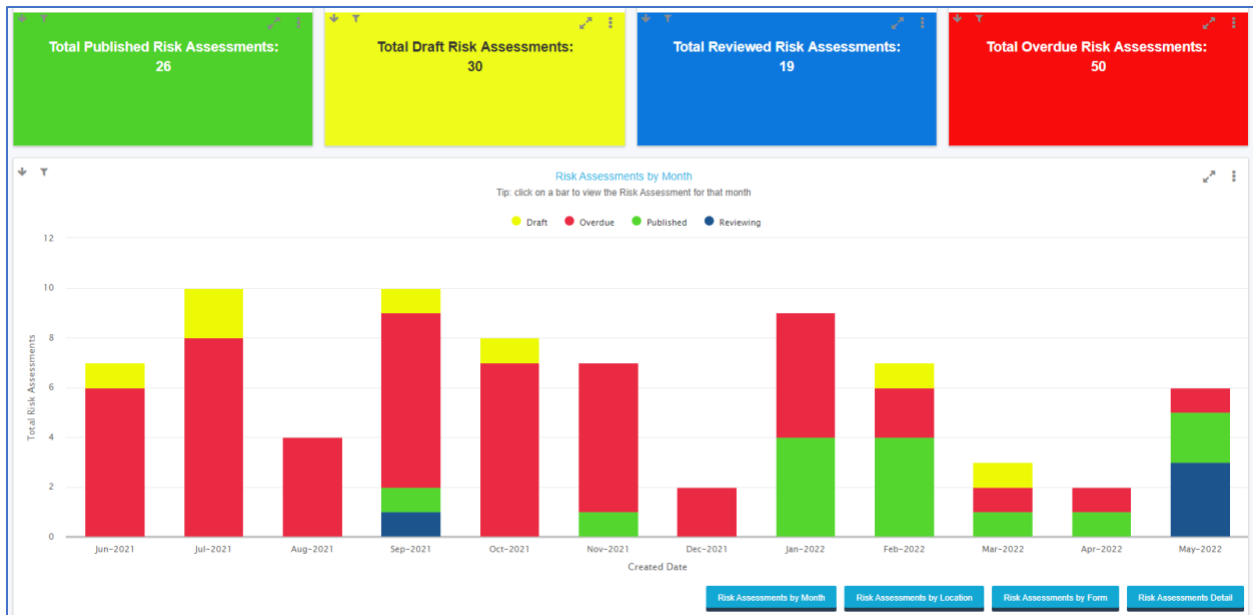
We have included Department Risk Manager and Restricted Department Risk Manager permission groups to help restrict visibility of Risk Assessment based on the user's links to Organisational Structure nodes.

Risk Management		
Name	Description	Permissions
Company Risk Assessments Manager	Apply this role to managers who need the ability to view and manage all risk assessments across your company	Permissions <b>11</b>
Department Risk Manager	Apply this role to managers who need the ability to view and conduct department risk assessments	Permissions <b>11</b>
Restricted Department Risk Manager	Apply this role to managers who need the ability to view and conduct department risk assessments. You will not be able to delete Risk Assessments with this permission group.	Permissions <b>10</b>
Risk Assessor	Apply this role to users who need the ability to conduct risk assessments	Permissions <b>5</b>

**Note:** Restricted Department Risk Managers will not be able to delete Risk Assessments.

## Risk Assessment Dashboard

We have created a new Risk Assessments Dashboard to help you have a complete snapshot of how your Risk Assessments are performing across your whole business, whilst also enabling you to filter and drill down on different departments/projects as needed.



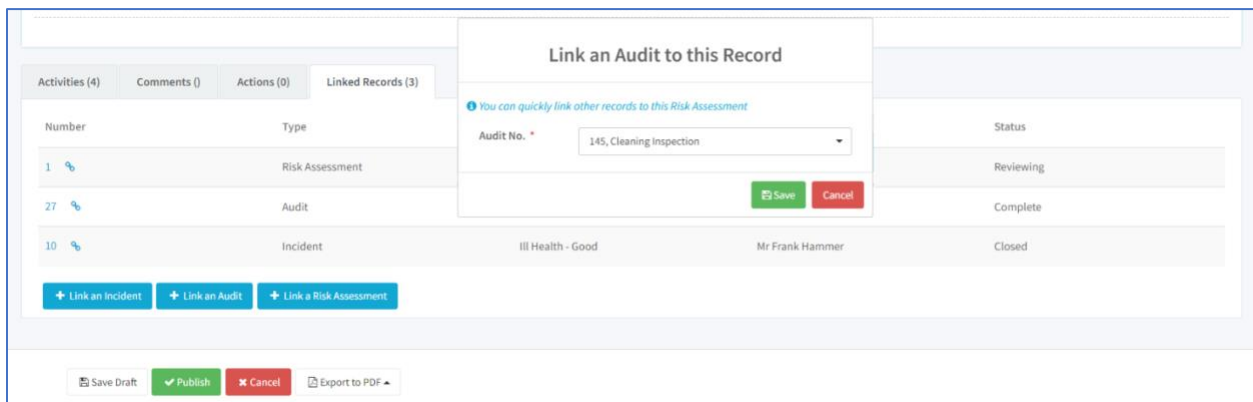


## Link all your safety records for a full audit trail

### Incidents / Audits / Risk Assessments > Linking Records

To help keep a complete audit trail of Health and Safety Records in Notify, at the footer of the Incident / Audit / Risk Assessment records, we have included the ability to link relevant records together.

**Note:** Once a record is linked it will clearly be listed on the Linked Records tab with a blue chain icon. You can remove the link from a relevant record by clicking the blue chain icon and using the Remove Link button.



Once you have linked records together, your relevant Incident / Audit / Risk Assessment will include a Linked Records section in the PDF Export.

Linked Records				
#	Type	Description	Assignee	Status
27	Audit	Monthly Cleaning Inspection	Mr Nielson Watts	Complete
10	Incident	Ill Health - Good	Mr Frank Hammer	Closed
1	Risk Assessment	Desk Workstation Assessment	Mr Nielson Watts	Reviewing

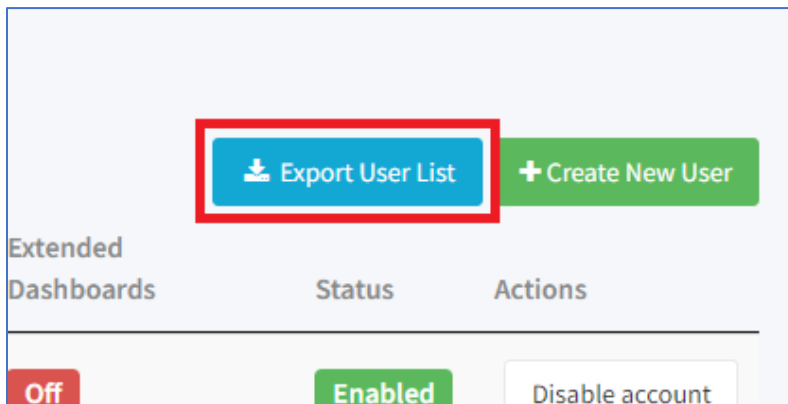
**Note:** We have also included a Linked Records column within the relevant CSV Export for Incidents / Audits / Risk Assessments.

## General Usability Enhancements

### User Management > Export User List to CSV

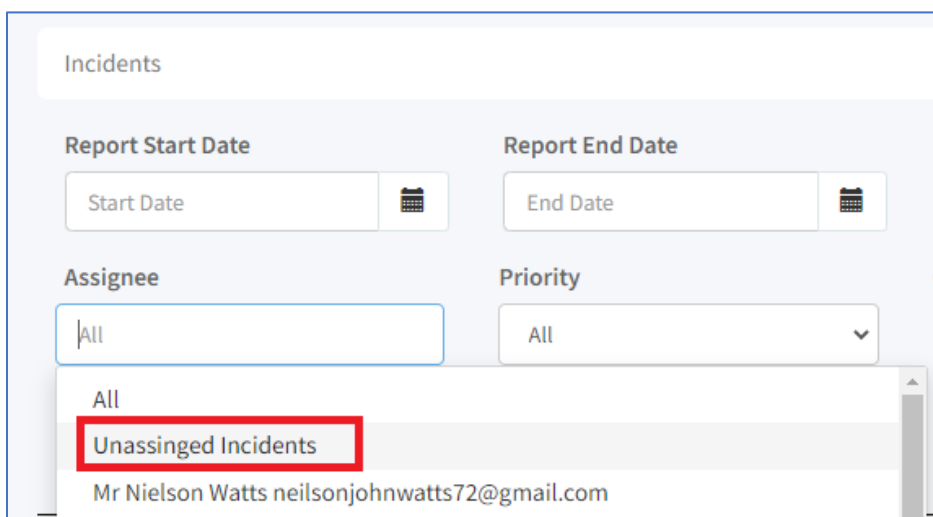
For users with access to the User Management, it is now possible to Export User List to a CSV file.

**Note:** The CSV Extract will include Full Name, Username, Modules Enabled, Org Structure Links, the Permission Groups applied and whether the user is enabled or disabled.



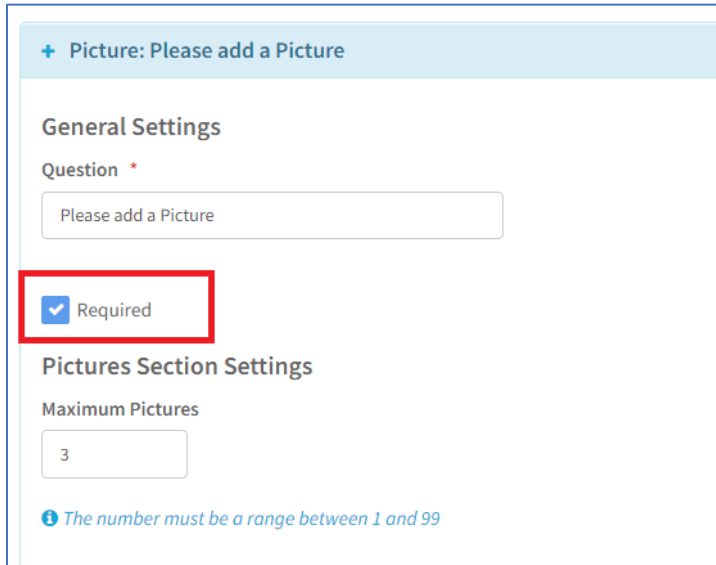
### Incidents > Assignee - Unassigned Incidents filter

To help get a quick view of all incidents that have not yet been assigned for investigation, from the Assignee filters drop down we have added 'Unassigned Incidents' selection.



## Form Template Management > Add Required checkbox to Picture Field Type

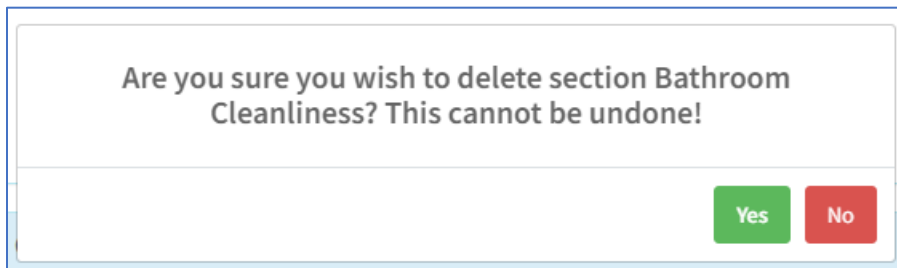
Following customer feedback asking to have an option that enables the ability for a Form Template to force a picture to be taken, we have added the Required Checkbox to the Picture Field type.



The screenshot shows a settings panel for a 'Picture' field. At the top, it says '+ Picture: Please add a Picture'. Below this is a 'General Settings' section with a 'Question' field containing the text 'Please add a Picture'. A red box highlights the 'Required' checkbox, which is checked. Below that is a 'Pictures Section Settings' section with a 'Maximum Pictures' field set to '3'. A blue information icon and text at the bottom state: 'The number must be a range between 1 and 99'.

## Form Template Management > Are you sure you want to delete a Question/Section

To help minimise accidentally deleting a section or a question when designing an Audit, Inspection or Checklist, we have added an extra prompt asking you confirm if you want to delete it or not.



The screenshot shows a confirmation dialog box with the text: 'Are you sure you wish to delete section Bathroom Cleanliness? This cannot be undone!'. At the bottom right, there are two buttons: a green 'Yes' button and a red 'No' button.

## Form Template Management > Clone a Question

To help speed up your form template design, we have added the ability to clone a question.

+ Red/Amber/Green: How clean is it?

**General Settings**

Question \*

How clean is it?

Required     Remember last answer     Hide not applicable option

**Red/Amber/Green buttons settings**

Red option text    Amber option text    Green option text

Dirty    Average    Clean

### Restricted Department Incident Manager > Can Change Incident type

Following customer feedback, we have now added the 'Can Change Incident Type' permission to the Restricted Department Incident Manager permission group.

## German & Mongolian Localisation

We have localised Incident Management, Action Tracker Modules and Notify IM Mobile App (IOS and Android) into German & Mongolian.

**Was möchten Sie berichten?**

- Vorfall**  
Tatsächlicher Verlust oder Beschädigung von Geräten / Vermögenswerten / Eigentum
- Umwelt**  
Vorfall, der nachteilige Auswirkungen auf die Umwelt hat
- Gefahrenstelle**  
Eine Situation für potenziellen Schaden oder nachteilige Folgen
- Qualität**  
Ein Prozess / Lieferung / Produktanliegen
- Guter Spot**  
Lobenswertes Handeln / Verhalten / Verarbeitung

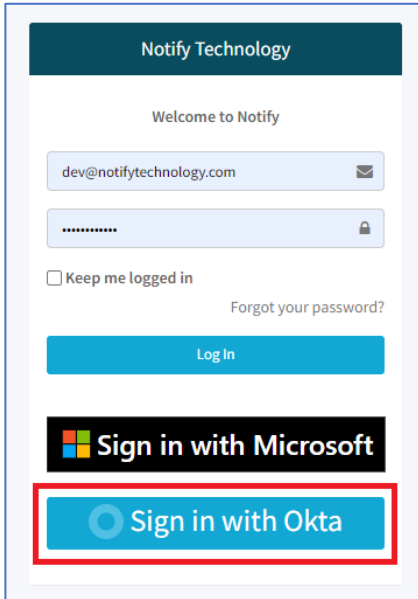
**Та юу мэдээлмээр байна вэ?**

- Осолд дөхсөн тохиолдол/Аюул**
- Өвчлөл**
- Гэмтэл**

## Security Enhancement with Okta SSO (Single Sign On)

### Single Sign On > Okta Integration

We have introduced the ability to sign into (i.e., authenticate) to Notify Cloud via a Single Sign On (SSO) method utilising Okta.

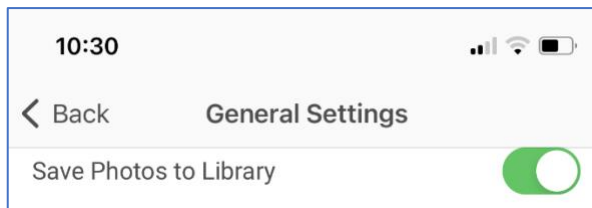


## Recent Mobile App Enhancements

### Notify A&I - Save Photos to Library

We have enhanced the Notify A&I App, so that any photos you take and append to an Audit, Inspection or Checklist can be automatically saved to your Photo Library.

You can check these settings by going to Settings > General Settings



## Notify A&I - App Sync Filter - All / Assigned to Me/ Created by Me

To help further manage your mobile data and the volume of Audits you download to the Notify A&I App, we have added a new filter option.

You can check these settings by going to Settings > App Sync Settings.

