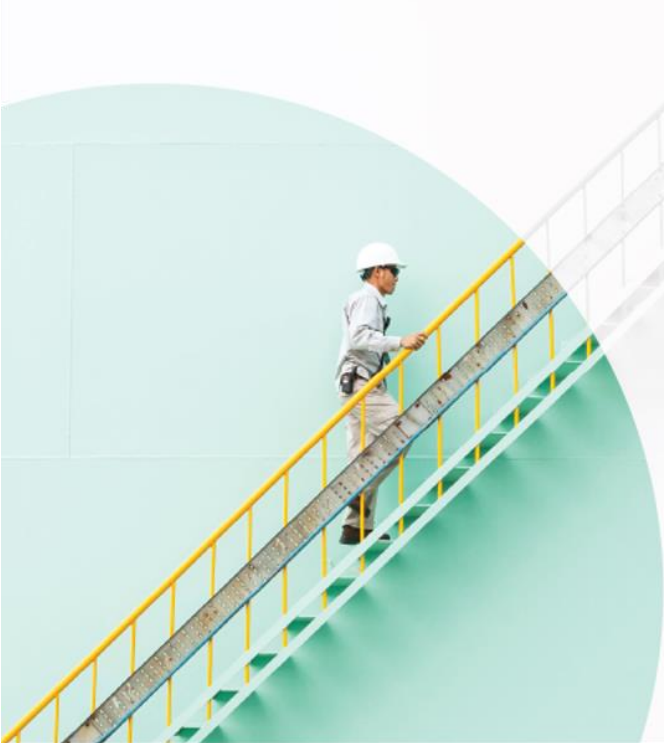


SAI360 for EHS and Operational Risk

v2020.2 and Roam 5.5
Release Overview





SAI360 v2020.2 with
Roam 5.5 available mid-
late November 2020.

This bulletin highlights
the improvements in

Contents

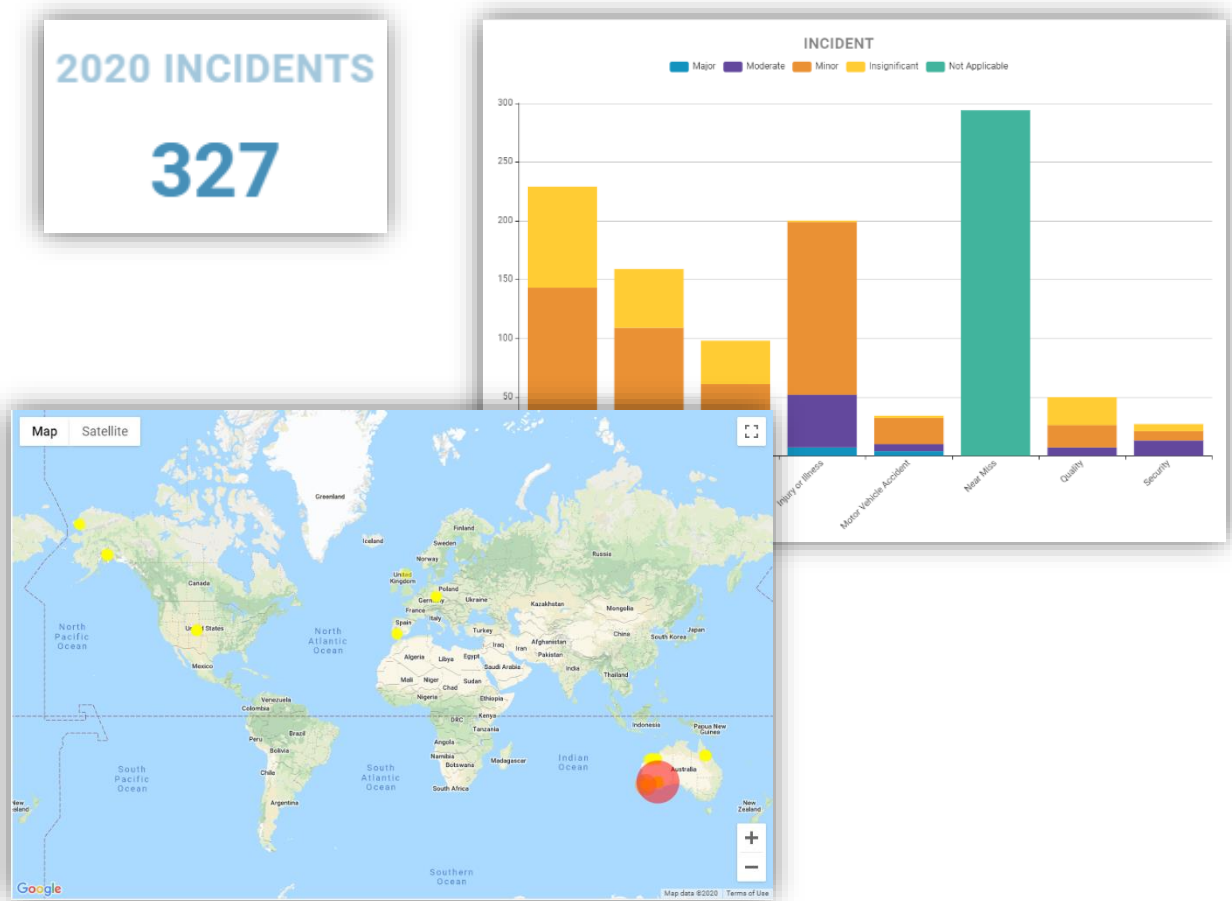
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The information in this document represents functionality that will be delivered and is still in development. Currently unknown circumstances may impact our plans. This may result in changes to the information, and actual functionality delivered.

LIST VIEW VISUALIZATIONS

List View Visualization extends our self-service Business Intelligence (BI) capabilities. End-users can easily undertake ad-hoc analysis, by instantly transforming any List View data into a visualization. It provides an interactive view of data from List Views incorporating any filtering, and information from user added columns. The Visualizations can be added to dashboards and users can drill through to the originating List View.

Visualizations are available in bar charts, stacked bar charts, pie charts, line charts, number tiles and map charts. Users can select the fields for the X and Y axis and Series when available.



IMPORTANT:

- All new functionality, including but not limited to List View Visualization, Bulk Data Updates and Geo-Mapping, is not supported on IE11.
- Visualizations provide a quick and easy way to visualize live data and are not saved per user.
- Visualizations are available for a subset of our field types. More details are available in our Online Help.

GEO-MAPPING

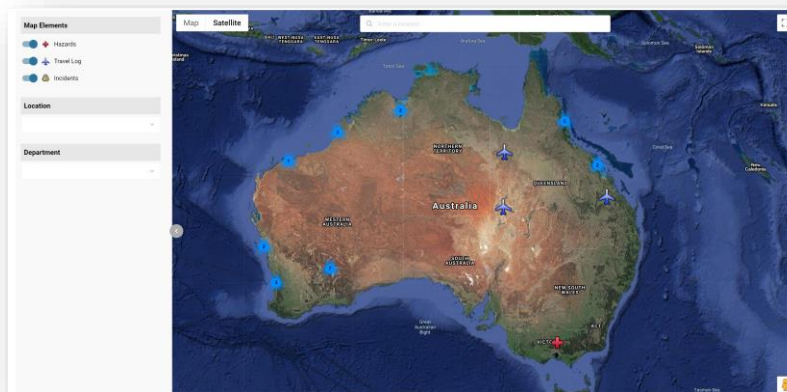
V2020.2 introduces new mapping functionality for use in dashboards (Dashboard Maps) and forms (Form Maps).

The mapping functionality utilizes Google Maps and therefore require a licence to use it in the Web Application.

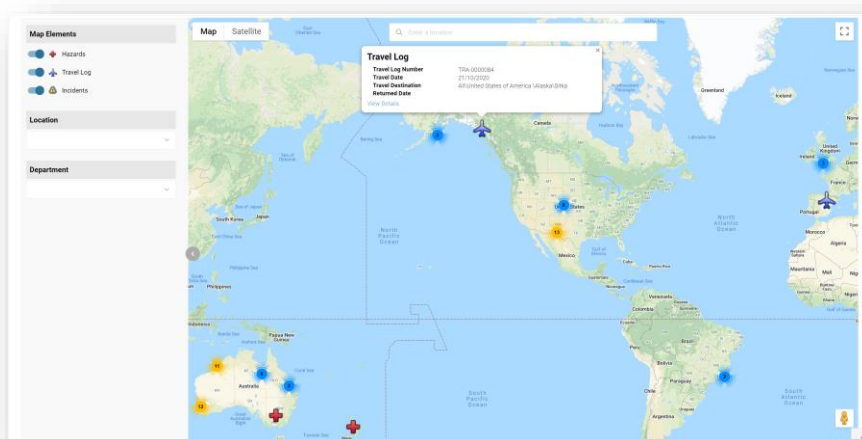
Dashboard Maps

Dashboard Maps makes data more engaging and approachable to support faster decision-making per location. The new functionality enables users to visualize and access information directly from an interactive map.

- Administrators can define maps that display pins for individual records. A single Dashboard Map can display a combination of records across multiple modules such as Incidents, Audits, Safety Observations, etc., all of which can be toggled on or off.
- Filter options (e.g. Location, Department, etc.) can be defined so that they apply to one or more of the “Map Elements”.
- The Dashboard Maps are interactive, so users can zoom in/out, search, pan, and change views (e.g. Satellite, Terrain, etc.).



- Clicking on a pin will display a summary tooltip, with the option to drill-through to open the full record in a new tab.



IMPORTANT:

- Dashboard maps are available in the Web Application only.
- All new functionality, including but not limited to List View Visualization, Bulk Data Updates and Geo-Mapping, is not supported on IE11.

Form Maps

Form Maps (or Geo-Pickers) allow users to set or view the exact location of a record on a Google Map with a data entry form.

This functionality is available in the Web Application and Roam, and can be configured on any form.

The screenshot displays the 'Incident' form in the SAI360 application. The form is divided into three tabs: 'Notification', 'Incident Details', and 'Supporting Documentation'. The 'Incident Details' tab is active. The form contains several fields for incident information:

- Incident Number:** A text field with the value 'Generated on save'.
- Reported Date:** A date picker showing '12/10/2020'.
- Incident Date:** A date picker showing '12/10/2020'.
- Location:** A dropdown menu showing 'All Locations/Australia/Western Australia/Head Office'.
- Geo Location:** A section containing a Google Map. The map shows a street view of an area in Perth, Australia, with a red pin indicating the location. The address below the map is '142 Hasler Rd, Osborne Park WA 6017, Australia'.
- Reported By:** A dropdown menu showing 'Ackley, Bethany, Risk Manager'.
- Reported Time:** A time picker showing '14:21'.
- Incident Time:** A time picker showing '11:21'.

The map interface includes standard Google Maps controls like 'Map' and 'Satellite' views, a search bar, and a zoom in/out button. The address field at the bottom of the map section is '142 Hasler Rd, Osborne Park WA 6017, Australia'.

IMPORTANT:

- All new functionality, including but not limited to List View Visualization, Bulk Data Updates and Geo-Mapping, is not supported on IE11.
- Using Geo-Mapping Features in the Web Application requires a Google Maps API Key.
- To enable and use Dashboard and Form maps requires configuration.

BULK DATA UPDATES

This highly anticipated functionality reduces the administrative burden of managing data, allowing administrators to update records in bulk from a list view. Authorized users can:

- Select one or more records from a filtered List View
- Access “Bulk Update” from the menu
- Select values to apply to one or more of the fields from the List View
- Apply the same change to all selected records

For example, closing several open Incidents, or reassigning several Actions, can be done using the Bulk Update.

When records are updated, form actions, (such as emails) and validations are triggered. Users with elevated privileges can choose not to run form actions or validations. The process also respects security configuration.

The screenshot shows the 'Open Incidents' list view in SAI360. A modal titled 'Bulk Update' is open, displaying 'Updating 8 records'. The modal contains three input fields: 'Sign Off Date' (a text box), 'Person Signing Off' (a dropdown menu), and 'Close this Record?' (a dropdown menu). Below these fields are two checkboxes: 'Run Form Actions?' and 'Run Form Validations?', both of which are checked. The background shows a table of incidents with columns: INCIDENT NUMBER, SIGN OFF DATE, PERSON SIGNING OFF, and CLOSE THIS RECORD. The table lists incidents from INC-000537 to INC-001033. A right-hand menu is visible with options like 'Add/Remove Columns', 'Sort Multiple Columns', 'Delete', 'Advanced Filter', 'Advanced View', 'Export', 'Pin', 'Bulk Update' (highlighted), and 'Visualize'. The bottom of the modal shows '1 - 20 of 28 results' and pagination controls.

IMPORTANT:

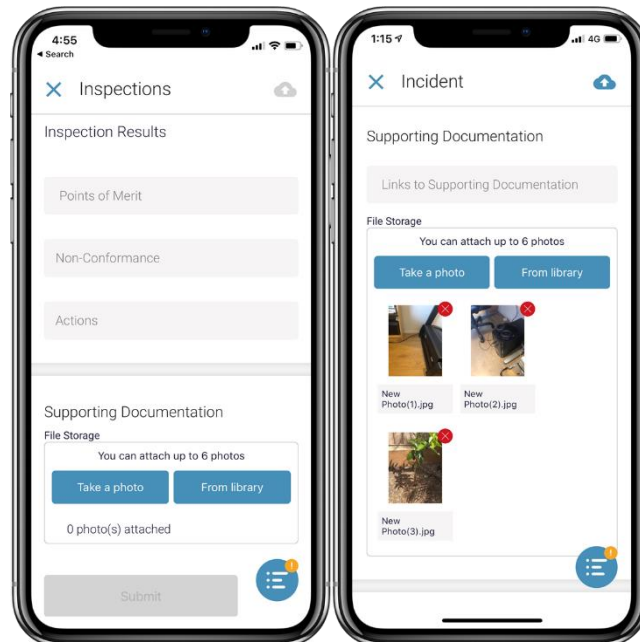
- Access to Bulk Update is controlled via Security Policies.
- Bulk updates requires a user to select records from a List View, thereby allowing administrators to update one or more records from one page at a time.
- Supported fields include: Text, Date, Single Lookup lists and Single Component lookups. More information is in our online help.
- All new functionality, including but not limited to List View Visualization, Bulk Data Updates and Geo-Mapping, is not supported on IE11.



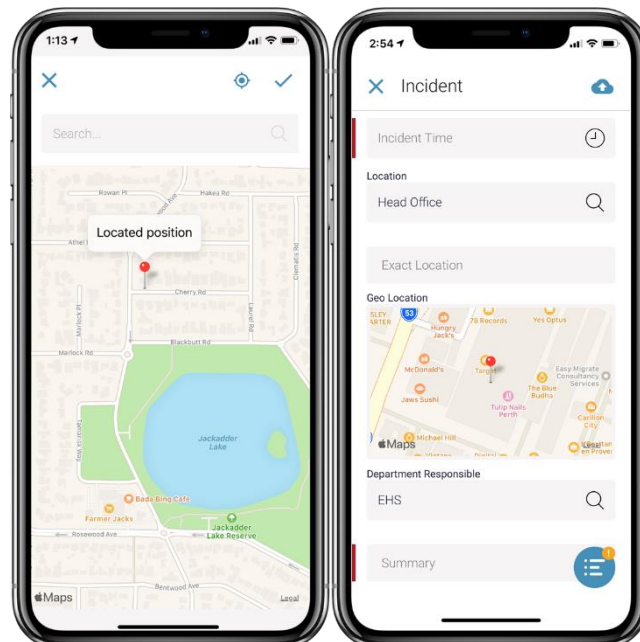
ROAM V5.5

Roam 5.5 includes the following user experience and user interface improvements to make data entry more engaging and faster:

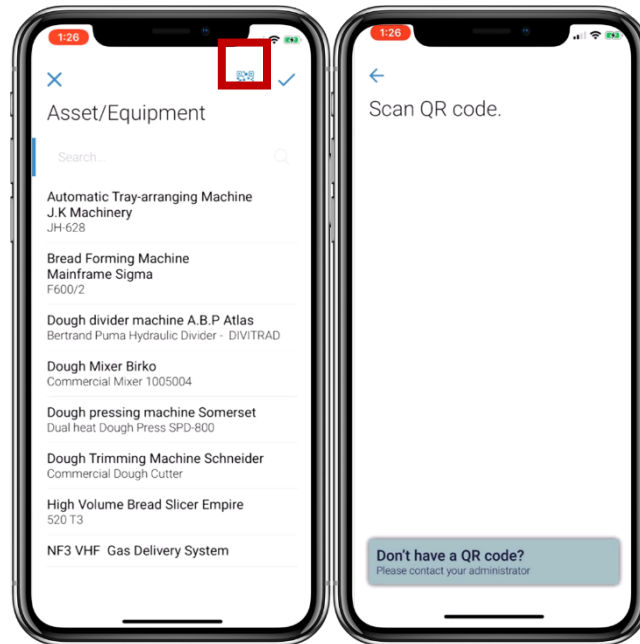
Improved user interface for attaching and viewing photos. Photos display inline with other form fields and the number of taps to add or view photos is reduced.



Interactive geo-picker to enable the user to view and set a pin at an exact location.



QR Code support - Allowing scanning of QR Codes from referential data like equipment



IMPORTANT:

- Roam supports scanning of QR Codes generated using the SAI360's Unique ID of the record. Existing QR codes cannot register when scanned.
- In our next major release (v2021.1) QR codes from other sources will be able to be interpreted by Roam, so clients do not need to create QR Codes using SAI360's Unique ID.

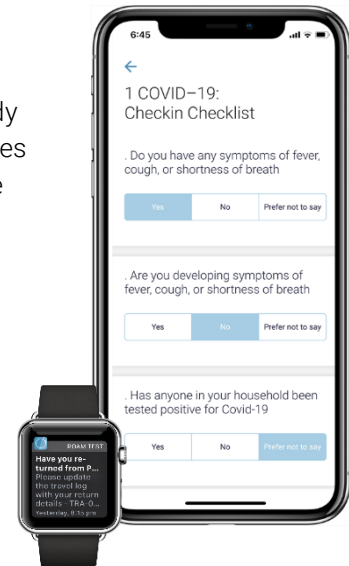
IMPROVED AND NEW MODULES

Travel Log

The Travel Log supports the safe movement of workers. It is mobile-ready and includes a log of persons who have been in contact. If the worker does not complete their return, the system notifies their manager to ensure the workers' safety and wellbeing.

COVID-19 Case

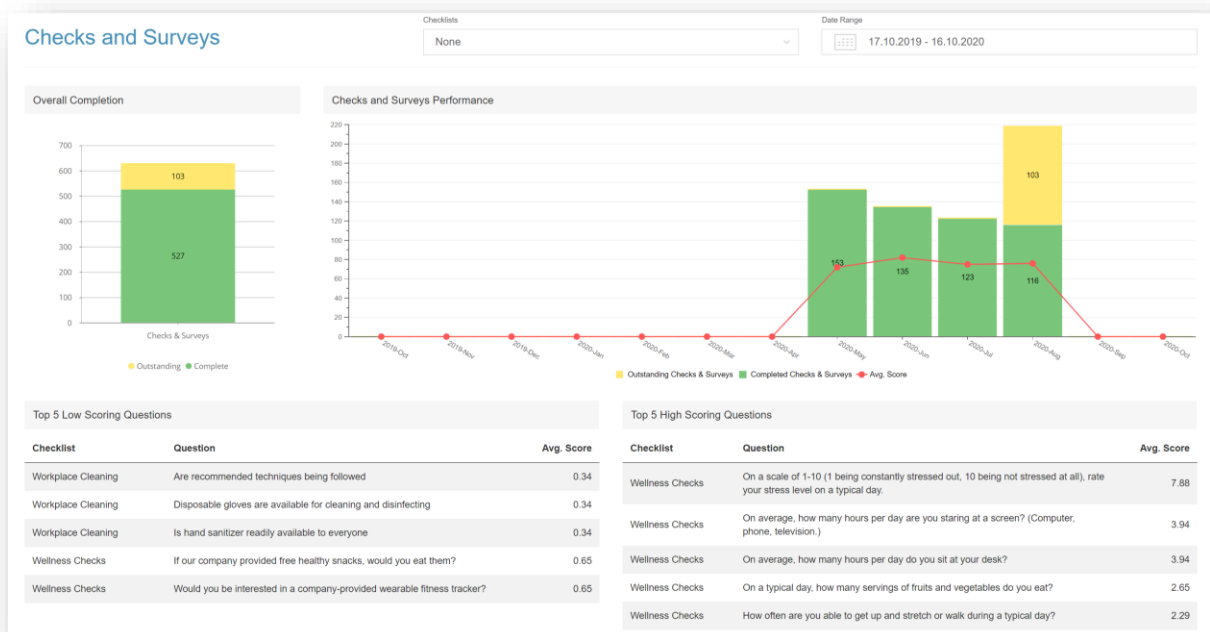
The Covid Case module allows workers to check their symptoms against generally accepted indicators. If further investigation is required, the system sends automatic notifications to the person's supervisor and the nominated health team for the assignment of a case manager. The system automatically adds any recent travel from the Travel Log to aid contact tracing efforts.



Employee Engagement - Checks & Surveys

Checks and Surveys provides a way to actively engage the workforce by sending ad-hoc and scheduled questionnaire to multiple workers across an organization. Typical use cases include but is not limited to:

- Send information and request an attestation using a simple questionnaire.
- Pre-start and readiness assessment before reintroducing workers to a facility.
- An employee health screening process to identify potential COVID-19 infections before recommencing work.
- Support and check the understanding of new or updated policies and processes.
- Monitor workers' health through self-certification.
- Support workers at home.



Out of the box BI Reports and Dashboards

- **COVID-19 Monitor:** This displays a summary of records from the Covid Case module
- **Essentials Insights:** This dashboard includes information from the Travel Log, Covid Case, Checks & Surveys and Safety Observations.
- **Essentials Dashboard:** This is a dashboard which includes links and List Views to modules included in the “Essentials Covid Pack” released in August 2020.
- **Checks and Surveys:** Provides analysis for Checks & Surveys sent to workers and overall responses.
- **Contractor Company Dashboard:** Updated dashboard of the Contractor League table which is now interactive

These improvements are only available if you use the out of the box module released with v2020.2. Existing clients will require configuration effort to make use of these new modules and improvements.

IMPORTANT:

- File Link/URL fields are not recommended. They are a security risk and not supported in modern browsers. Therefore, all out of the box modules no longer have this option enabled.

CONTINUOUS WEB APPLICATION IMPROVEMENTS

We continually add enhancements to improve the user experience. Below is a summary of our most requested enhancements from our user community. A complete list of all continuous improvements will be available in our release notes with the release.

Performance Improvements

- Several performance improvements have been made across the following areas:
 - Opening List Views
 - Exporting List Views
 - Opening records with many subforms
 - Handling of complex/consolidated security conditions and validations

With a configurable solution that allows customers to tailor to their own needs, it is not possible to quantify the performance improvements for all customers, we do expect in many cases it will be a significant improvement.

List View Exports

- There has been a notable change in the user experience for List View Exports, made as part of an initiative to improve system performance.
- List View Exports requested as a “Download” runs in the background and be provided to the user as a live instant ‘Notification’ in the Web App when ready. This allows the user to continue using the application after triggering an export.

Dashboards in Folders

- Administrators can configure sub-folders to group Dashboards, that are in our Dashboards Menu option.

Save to PDF generated by Analytics Rule

- Save to PDF was introduced in 2020.1. In 2020.2, an Analytics Rule can now generate this, which enables the PDF to be attached to a file subform. A prime use-case for this functionality is to capture a snapshot of a record at a point in time when any changes are made.

New and Old values recorded in the Audit Log

- The Audit Log includes the Old and New values when records are modified.

The screenshot shows a 'Record Details' form with the following fields:

- Record ID:** AFBWpemDwerUFAjYUgGGCzle
- Record Type:** Incident
- Old Values:**
 - Reported Date = "12/06/2018"
 - Incident Date = "09/06/2018"
- New Values:**
 - Reported Date = "12/06/2019"
 - Incident Date = "09/06/2019"

Reporting API & Questionnaires

- The Reporting API includes information from the 'Comments' section in Questionnaires.

Form Actions

- It is now possible to use values from the User Profile in Set Field Values
- Set Field values works irrespective of whether a user has Write permission or not. Removing the need for Analytics Rule to work around this previously.

SUCCESSING WITH AN UPGRADE

V2020.2 and Roam 5.5 release enhances end-user and administrator functionality for a better experience. It not only adds more capabilities for data entry, data analysis, self-configuration and self-administration of the software but includes performance improvements across a range of standard functionality.

To succeed with an upgrade here are items to consider:

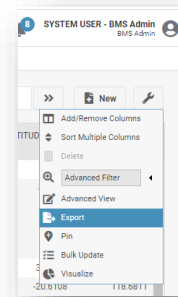
- **Learn more about the new version:** Understand the changes and how your users will use it. Our upcoming webinar is an excellent start as it will showcase the improvements and provides a chance to ask questions. Consider tailored demos to focus on specific areas of interest and do deeper dives.
- **Plan your upgrade:** Talk to our experienced services team and plan your upgrades when your key resources are ready and at a time that suits you.
- **Communicate end-user changes:** Understand the end-user changes and support your end users by communicating these changes. In v2020.2, notable ones that all end-users will experience include:
 - **Banner notification in IE11:** Users get a banner notification once a day to advise them to use a modern browser for a better user experience. The banner notification disappears after 5 seconds.

⚠ We've noticed you are using an older browser. Some of our newer features may not perform optimally. To ensure you get the best experience, consider switching to a modern browser. ✕

- **List View Exports:** There is a change in behaviour to improve performance and allow users to be more efficient. The change is explained below:

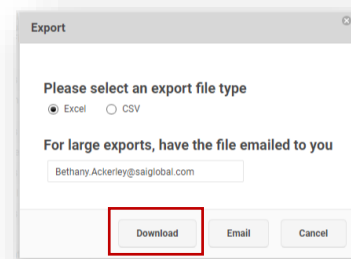
1

From a List View, a user chooses to Export.



2

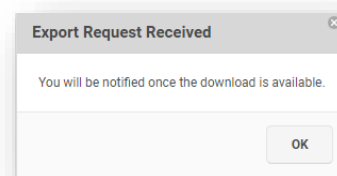
The user clicks on Download.



3

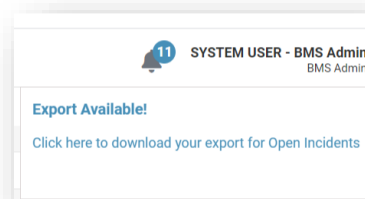
The user gets a pop-up message.

The user can continue with other tasks in the system, removing the need to wait for the download.



4

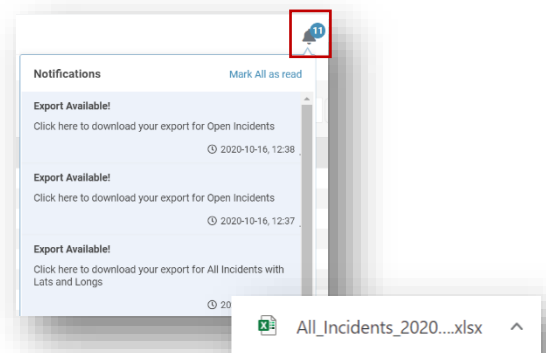
When the download is ready, an instant notification appears.



5

Users can access all the requested downloads by clicking on the Notifications option (bell icon).

Clicking on a Notification downloads the file and removes the Notification from the Notifications list.



END OF LIFE NOTICE

- **Internet Explorer 11:** In v2020.2, all new functionality, including but not limited to List View Visualization, Bulk Data Updates and Geo-Mapping, is not supported on IE11. These new features need configuration, minimizing the impact for customers using IE11, as they need to choose to turn these on. We will cease all support for IE11 with our v2021.1 release, anticipated first half of 2021.
- **Microsoft Edge Legacy:** We will cease all support for Microsoft Edge Legacy with our v2021.2 release, anticipated in the second half of 2021. This is at the back of Microsoft ending support for this browser in March 2021.
- **Analysis Tool:** Analysis Tool will not be available with any version post January 2022. All support for Analysis Tool will end as of 1st January 2022 across all released versions.
- **PDF Offline:** PDF Offline will not be available with any version post January 2021. All support for Analysis Tool will end as of 1st January 2021 across all released versions.

For more information regarding the above end of life notices, please contact your account manager.