



SAI360
Risk | Learning | EHS | Sustainability

SAI360 EHS & Sustainability

v2022.1 and Roam 5.8

Release Bulletin



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INTRODUCTION

SAI360 v2022.1 and Roam v5.8 is now available. This bulletin highlights what is in the release:

- New Procedural Walkthroughs.
- Improvements to our pre-configured Metrics Management module.
- New Lock Out Tag Out Module.
- Improved Business Planning Module.
- Roam Improvements including annotating photos and attaching files.
- A range of improvements to further reduce the effort of administering and configuring the platform.
- Platform performance changes across the web and mobile application to boost user experience.
- Security improvements for better protection.

Improvements in the release demonstrate continued investment to improve our pre-configured modules, user interface and experience, data analytics, self-service configuration, and administration while ensuring the platform is highly performant and secure.



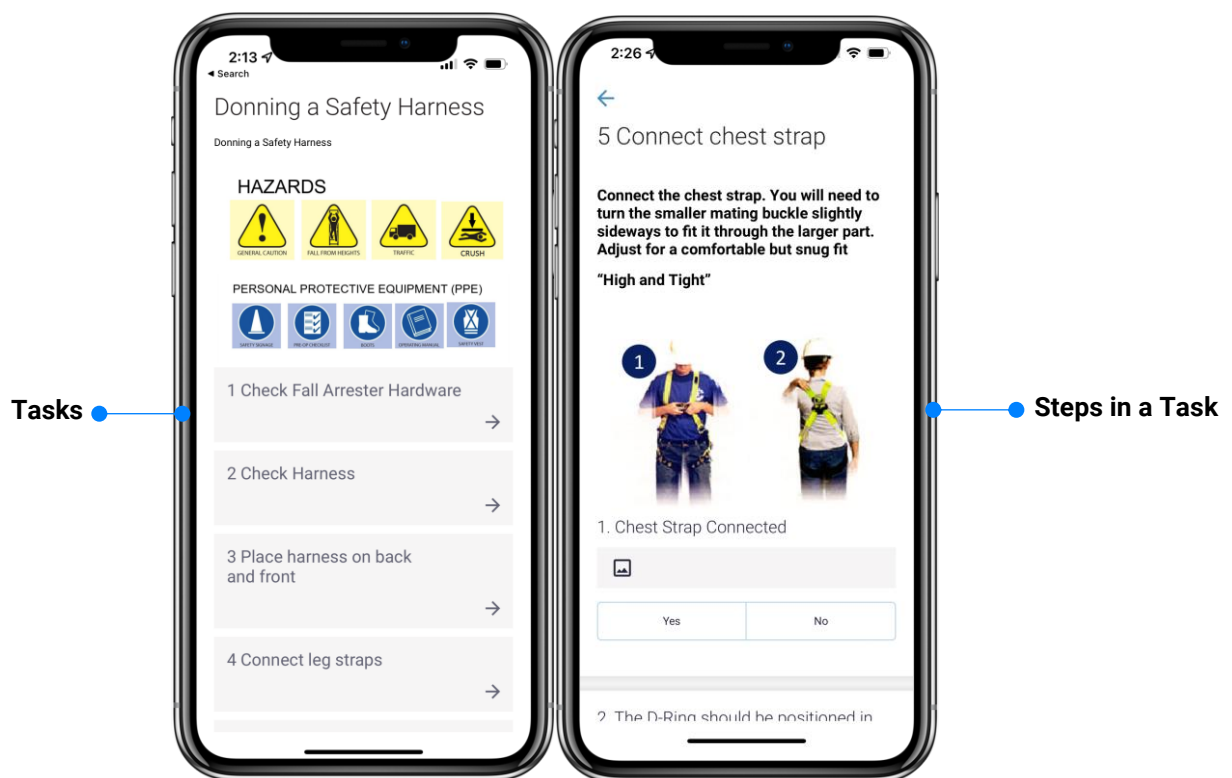
MODULE ENHANCEMENTS

Procedural Walkthroughs

Just-In-Time access to up-to-date and easy to follow procedures can help protect workers. Procedural Walkthroughs are designed and optimized for Roam to provide users in the field with anytime access to procedures so they undertake their jobs safely. The feature-rich, interactive step-by-step procedural checklists guide workers through every critical step of a job. Procedural Walkthroughs can be added to any business process.

Administrators can build an unlimited number of templates. Each template lists all the required Tasks to be completed. Images and rich text can be added to help explain the Task. Each Task contains a list of the Steps which need to be completed.

Users are guided through the Walkthrough, Task by Task and Step by Step. Users can check the steps they have completed, allowing them to track the progress of their Walkthrough tasks.



Procedural Walkthroughs and Guidance

The procedural Walkthrough is embedded in the new Lockout/Tagout (LOTO) pre-configured module.

IMPORTANT:

- Procedural Walkthrough is a licensed feature and will require configuration to enable in modules. Please get in touch with your SAI360 representative for more details.



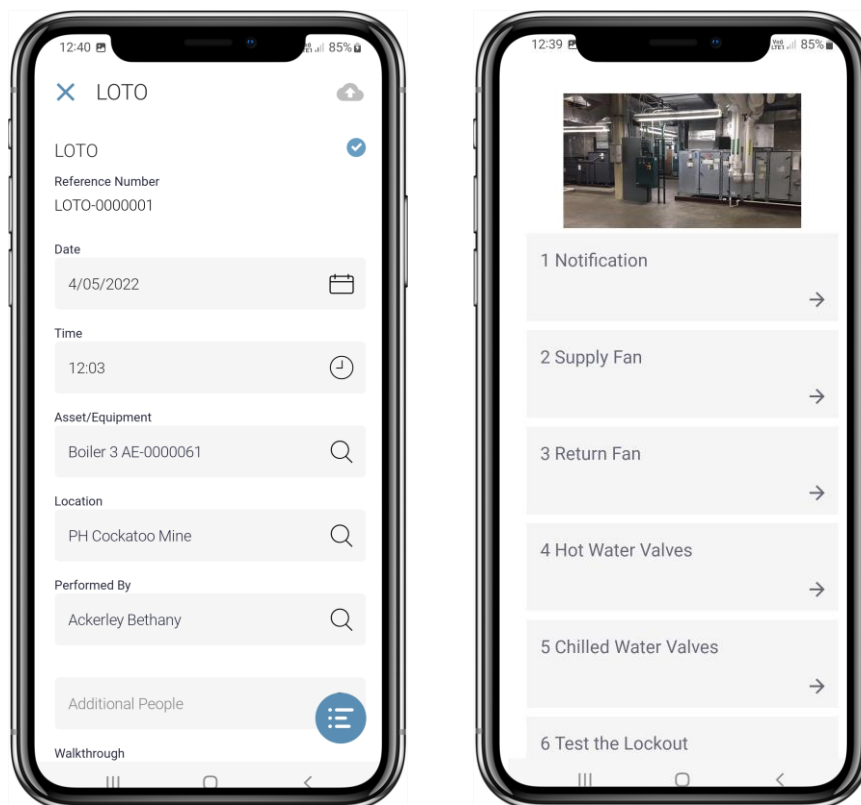
New Lock Out Tag Out (LOTO) module

Effective Lockout Tagout (LOTO) requires specific procedures for individual pieces of equipment and machinery to ensure that energy sources cannot cause injuries and fatalities. One procedure covering all equipment and machinery is rarely sufficient, as even the slightest difference can be catastrophic. Additionally, for effective LOTO, these procedures need to be easily accessible and easy to follow with evidence that they have been completed.

SAI360's new LOTO module is optimized for mobile. Workers are able to effectively disable, isolate, and de-energize equipment and machinery to prevent hazardous release of energy, resulting in injuries and fatalities.

The module includes the ability to:

- Initiate the process using QR Codes
- Present the worker with specific instructions for the particular piece of equipment or machinery
- Advise the worker how much of the process they have completed
- Ability to attach a photo as evidence for a step
- Visualize on a map all locked out/tagged out equipment or machinery in the vicinity of where a user is working via our Location-Aware feature



IMPORTANT:

- LOTO requires a licence and configuration to enable the module. Please get in touch with your SAI360 representative for more details.



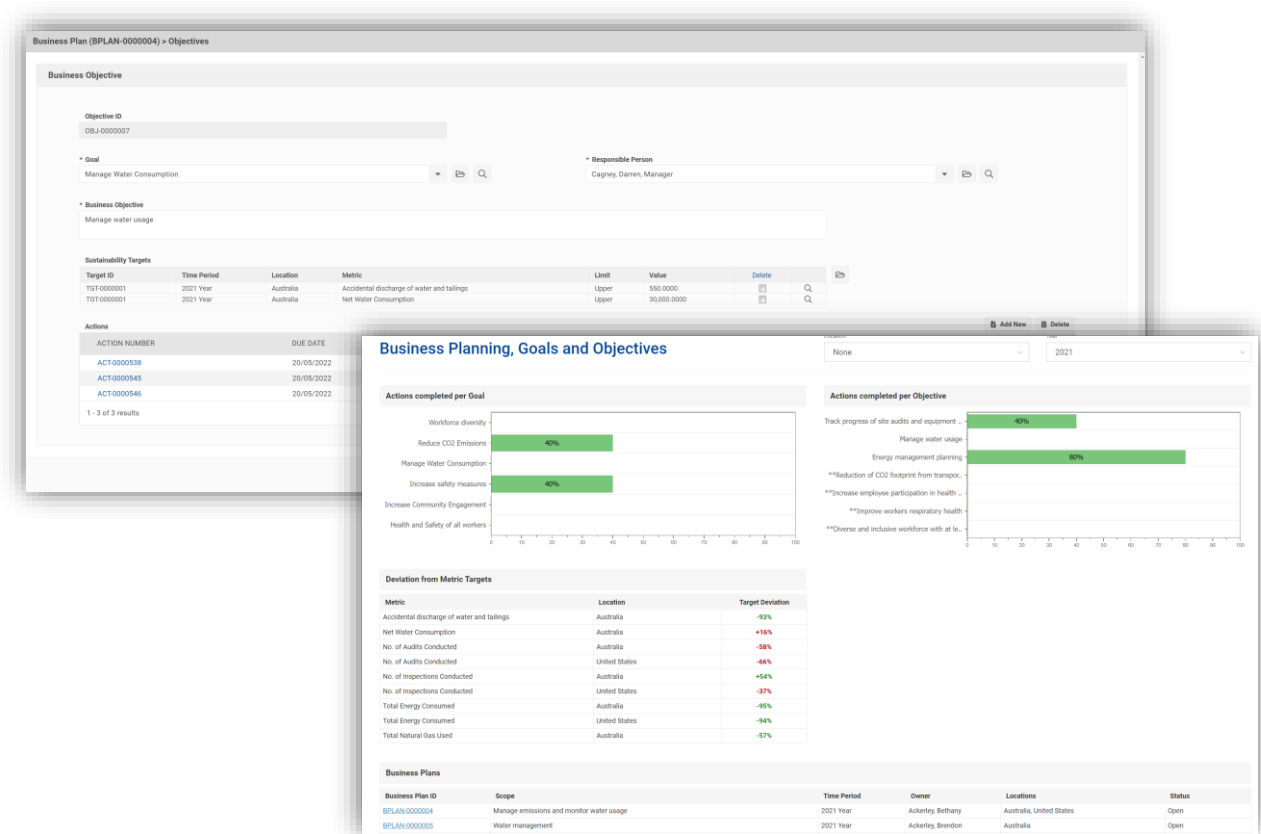
Improved Business Planning module

The growing importance of ESG at the back of a health pandemic is putting EHS & Sustainability teams at the center of driving and supporting ESG initiatives. And according to the “Global Corporate Survey: ESG And Sustainability Governance, Strategies And Priorities” by independent analyst firm Verdantix, EHS is the most significant business function with regards to implementing sustainability strategies.

The Business Planning module is improved to add capabilities that bring together ESG & Sustainability metrics, goals and targets into a centralized system of record.

The module includes the ability to:

- Create Plans, Goals, Objectives and Action plans.
- Link Objectives to Targets (from our Metrics Management module).
- Measure and demonstrate the performance and effectiveness of their ESG & Sustainability initiatives and goals.



IMPORTANT:

- Business Planning requires a licence and configuration to enable the module. Customers who are already using this module will require configuration to implement these improvements. Please get in touch with your SAI360 representative for more details.



Metric Level Review and Approval Workflow for Metrics Management

SAI360's Metrics Management module (released in 2020) supports companies measure, understand and communicate their environmental, social and governance (ESG) and sustainability performance.

The module optimizes the management of disparate qualitative and quantitative metrics across an enterprise. It streamlines data capture, validation, storage, security, and auditability in a centralized platform. As a result, organizations benefit from high-quality data to analyze ESG and sustainability performance and produce accurate and timely disclosure reports.

We recognize the accelerating importance of "investment-grade" data for demonstrating Environmental, Social and Governance (ESG) performance, which is why we now have a granular **Metric Level Review and Approval Workflow**. **The improvements include:**

- Reviewing data at the metric level allows for finer granularity of data auditing. The **Review Data** portal provides the ability to view all metrics currently *In Review*.
- In the Review portal, users are able to:
 - Change the values for each Metric if required and save the new values without changing the current Review Status
 - Approve or Reject individual or multiple records
- If a record has been:
 - Approved: The Metric is moved to Complete Data
 - Rejected: The Metric is pushed back to Outstanding Data
- Users are notified when a comment is added to a Metric. Likewise, when a Metric is *Rejected*, the Users are alerted so they can rectify any discrepancies or provide further explanations.

The screenshot displays the 'Review Data' portal for Australia. It features three distinct review sections, each with a 'Save' button and a red 'X' close icon. The first section, '2022 (04) April', shows 'Total Fuel Oils consumed' with a value of 225 TJ. The second section, '2022 Q2', asks 'Is the site ISO 45001 certified?' with radio buttons for 'Yes' and 'No' (selected). The third section, '2022 Year', shows 'Total fines paid' with a value of 10,000. At the bottom of the interface, there are three buttons: 'Save All', 'Approve All', and 'Reject All'.

Other improvements include:

- **Data Import:** The Metrics Data Import also updates existing data where required.
- **Performance improvements of the data entry portal.**

IMPORTANT:

- Metrics Management is a licensed module. Customers using the module will get the changes upon upgrade. Minimal configuration may be required to enable the review process. Please get in touch with your SAI360 representative for more details.



Web Application Enhancements

We continually add enhancements to a wide range of areas in our web application. Key ones are summarised below.

Automatic Translation of Text Fields

V2022.1 introduces the ability to auto-translate text fields using Google Translate. The text that is translated is stored in a separate field. The feature requires configuration and a Google API licence.

The screenshot displays two overlapping windows from a web application. The top window, titled 'Data Fields', shows a table with columns: Name, Description, Data Field Type, Internal ID, and Unique Id. Below the table, there are tabs for 'Definition', 'Translation Configuration', and 'Usage'. The 'Translation Configuration' tab is active, showing a 'Translation Destination' field with the value 'Action:Action Description Translated' and a '* Language' dropdown menu set to 'English (United States)'. The bottom window shows a detailed view of an action record. It includes a sidebar with navigation icons. The main content area contains several fields: '* Assigned By' (Kiss, Leslie, Manager), '* Due Date' (25/12/2021), '* Assigned To' (Ackerley, Bethany, Risk Manager), 'Action Source' (Obligation Management), 'Priority' (Medium), '* Action Summary' (Completion of Regulatory Checklist), 'Action Description' (监管清单已在季度董事会会议之前完成), and 'Action Description Translated' (Regulatory checklist completed prior to quarterly board meeting).

Only text fields can be configured to be translated.



Links to External Videos and Files

With v2022.1, it is possible to add one or more *Rich Links* to any form. The *Rich Link* form field supports links to external sources, such as Videos or Files. A *Rich Link* can be configured with a title, details, and a specific icon (using font awesome).

End users are able to access the links via Web Application and Roam forms.

The screenshot displays the 'EHS & Sustainability' interface for a 'Permit to Work : PTW-000006'. The workflow is shown as: New -> Submitted -> Review -> **Approved** -> Work Commenced -> Completed. The 'Approved' step is currently active. Below the workflow, there are tabs for 'Permit to Work', 'Approval', 'Undertaking and Completion of Work', 'Actions', and 'Supporting Documentation'. The 'Undertaking and Completion of Work' tab is selected, showing fields for 'Valid From Date' (10/04/2022), 'Valid From Time' (07:00), 'Valid To Date' (10/04/2022), and 'Valid To Time' (17:00). There are also fields for 'Commencing Work' (checkbox), 'Date Commenced', and 'Time Commenced'. At the bottom, a Rich Link field is visible with the text 'Click to Watch the Required Training' and a subtext 'You can watch the video to ensure tasks are done safely.' The user is identified as 'SYSTEM USER - BMS Admin'.

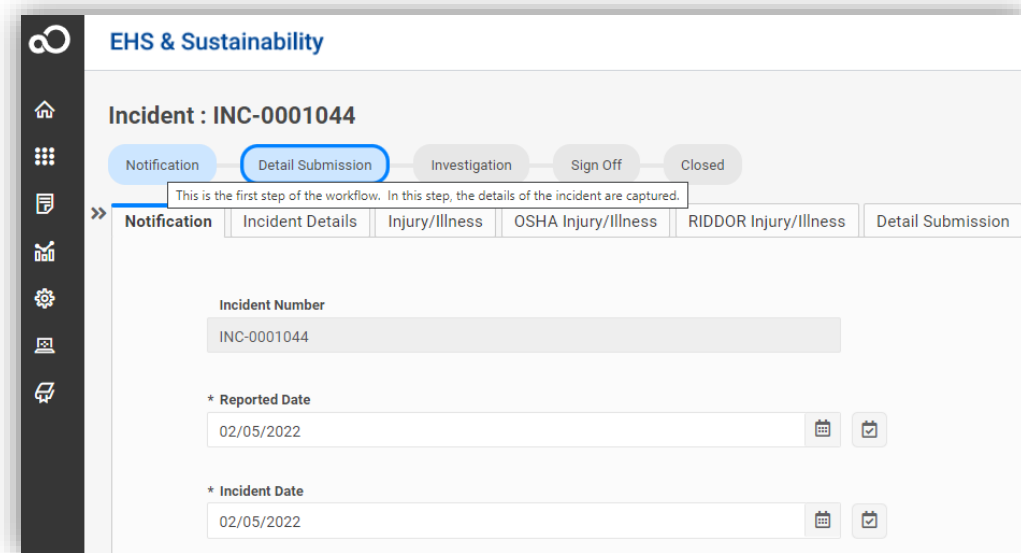
Rich Link Field on a Form

Rich Links may also be used for embedding links to eLearning courses on how to use a module. For more information about how SAI360's academy can assist with eLearning courses to improve adoption of the solution, contact your account manager.



Workflow Status

It is possible to add a description for each workflow step. The description is visible when a user hovers over the workflow step in the Web Application.



Workflow Description on Hover-Over

Business Intelligence

SAI360 v2022.1 is compatible with Pentaho 9.2.0.3. Upgrading is strongly recommended to keep up with the latest security patches.

Other Improvements

- The number of characters for Section names in Questionnaires has increased from 255 to 1000.
- Performance improvements, particularly for Word cloud visualization, Metrics Management data entry portal especially for many metrics, loading of List Views in specific scenarios, and when users log in.



Roam V5.8 ENHANCEMENTS

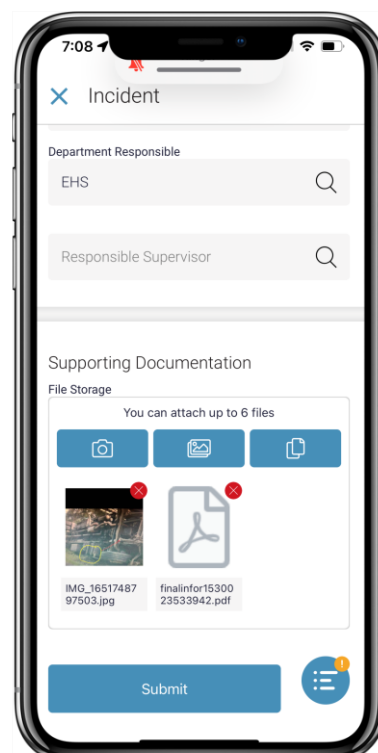
Image Annotation

To provide better and clearer information when data is collected, users are able to annotate images in Roam. Annotations are stored with the uploaded image.



File Type Attachments

In addition to image files, users are able to upload additional types, such as PDF.



IMPORTANT:

- To gain the full benefits of the Roam improvements, customers need to upgrade the web application to v2022.1.



SUCCEEDING WITH AN UPGRADE

V2022.1 and Roam 5.8 includes a range of platform, end-user and administrator enhancements. It adds more data entry, analytics, self-configuration, and self-administration capabilities and provides better performance. We strongly recommend an upgrade to gain the benefits associated with these improvements and leverage the security improvements for improved protection.

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 them. Our upcoming webinar is an excellent start as it will showcase the improvements and provide a chance to ask questions. Second, 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. When planning for your upgrade, consider discussing how you can use the improvements with our professional services experts.
- **Communicate end-user changes:** Understand the end-user changes and support your end users by communicating these changes. SAI360 can assist with training your users as part of an upgrade.

END OF LIFE NOTICE (FUNCTIONALITY NO LONGER AVAILABLE OR SUPPORTED)

- **Edge Legacy** (along with **Internet Explorer 11**) are no longer supported. Users attempting to access the web application using Edge Legacy or IE11 will see a page informing them that their browser is unsupported, and they will be unable to access the web application.
- **Analysis Tool:** Analysis Tool is no longer supported across all released versions. This includes all Analysis Tool functionality, including but not limited to: DB Listener, Reports, Imports and Escalation Emails. Analysis Tool is an unsecured legacy solution, and we recommend moving to the functionality available in the Web Application.
- **MS SQL 2012:** MS SQL 2012 is no longer supported with v2022.1. Supported versions include SQL 2014 through to SQL 2019.

For more information regarding the above end of life notices, please get in touch with your account manager.