

Version 6.7 Release Notes

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Summary of Release Items

Pages

Custom Alerts - Improve communication and accountability with Custom Alerts.

"Check Out to Other" Improvement - Check a page out to another user more easily and automatically add him/her as an Editor in a single step.

Expired Items Dashboard, "Show All" toolbar and filter - Expired and Expiring Items on your policyIQ Dashboard are now more manageable, with better filter and toolbar options when viewing the complete list.

Forms

Searches include Forms - Search for Forms in the Home module using the simple Search functions. Results in Search will now include Forms.

Run Form Templates/Form Lists on Open Date - when opting to Run Form Templates or Form Lists with an Open Date scheduled in the future, notification will be sent on Open Date (not before).

"Back to Activities" - navigation is more user friendly with a toolbar option to go "Back to Activities" after drilling into a list of Forms.

New Form Reports Column Options - Add Folders and Viewers as column options for Form Reports.

Bulk Edit Form List Templates - In addition to other "bulk change" edit options previously available, it is now possible to bulk change Folders and Viewers on Form List Templates.

Reports

Site-wide Report Categories - Report Categories are now available both as user-specific and site-wide options.

Site Administration

"Back to Attachment List" - navigation is more user friendly with a toolbar option to go "Back to Attachment List" after drilling into the list of pages with Attachments in Setup.

Enhancement for Importing Pages - policyIQ now includes the option to export the Template Outline to Excel (csv) for simplified look-up of policyIQ IDs.

New User Alert Message - policyIQ will display an alert message to Subscription clients when a new Advanced or Standard user is added to policyIQ.

E-mail Settings - policyIQ site emails are now generated from a single source.

User Import Email Notification - Send email notifications (today or on a future date) to those users added via the Import function.

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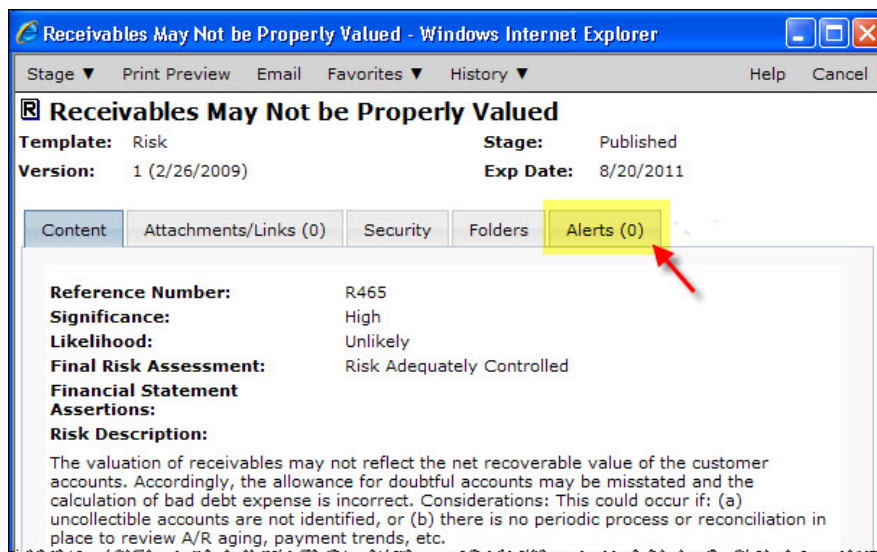
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Custom Alerts

Over the years, many of you have asked for greater flexibility in determining how you communicate policyIQ information to your users and to others outside of policyIQ. You want to ensure that selected people receive notifications based on certain field values or actions performed on your policyIQ Pages, and you want to schedule activities based around the information you capture on your Pages. Our new Custom Alerts functionality addresses these requests and opens the door to many new opportunities and possible uses for policyIQ.

As you know, the fields on your policyIQ Pages are completely customizable. You label your fields with the names that identify what type of information you're capturing, and you populate the fields with options for your users to select. The new Custom Alerts feature lets you trigger e-mail notifications or Dashboard messages to be sent to a custom list of users when specific information has been selected on your Pages, or when other milestones are reached.

Custom Alerts are specific to individual Pages, and are set on the new Alerts tab. Page Administrators and Editors can add Alerts without needing to Unpublish a Page, and most types of Alerts "trigger" on Published Pages. Note that you can set Custom Alerts around all of your policyIQ field types except for Rich Text, Short Text, Static Text, and Line Separator fields.



Here are a few examples of how you can begin taking advantage of this new functionality:

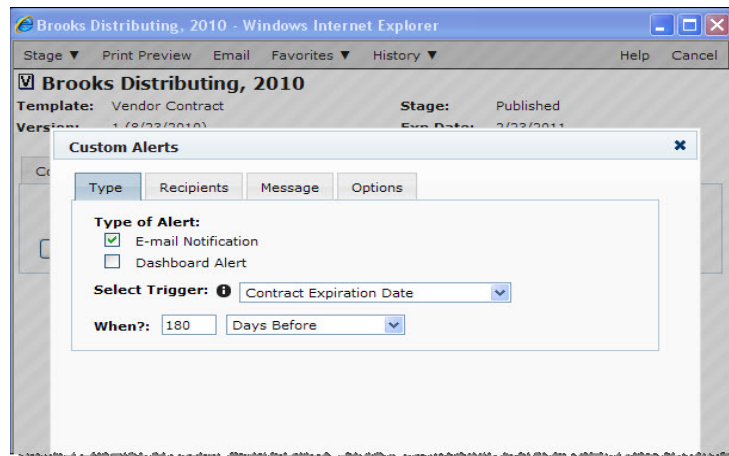
Notify a Contract Owner to update their Contract Page when it reaches its renewal date

You can now schedule notifications to your users driven by milestones set on your policyIQ Pages. This will be especially useful in areas such as Contract Management, where you want users to periodically review and update their Pages, based on specified dates.

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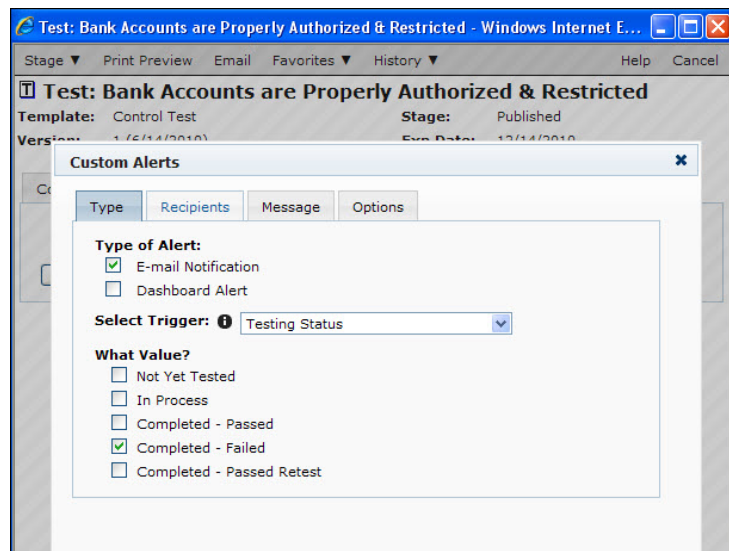
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For example, you can create a Custom Alert that will send an email to a Contract Owner when their Contract is three months out from its Expiration Date (a custom date field set on the Page). Perhaps this is the milestone at which the Contract Owner is responsible for beginning the renegotiation process, so you want to be sure they're reminded when this milestone is reached.



Notify a Process Owner when a Tester selects a status of "Failed" on a Test Page

Do you administer a compliance process that includes the testing of Control Pages? Would you like to notify a manager or process owner when a Test fails? This new feature will allow you to add a Custom Alert to the Status field on your Test Pages. When your tester publishes a Test Page with a Status of Failed, your selected recipients will receive an automatically generated Alert. You can specify whether the Alert should be an email (you can even email individuals who don't have access to policyIQ), or a notification on a selected user's Dashboard.



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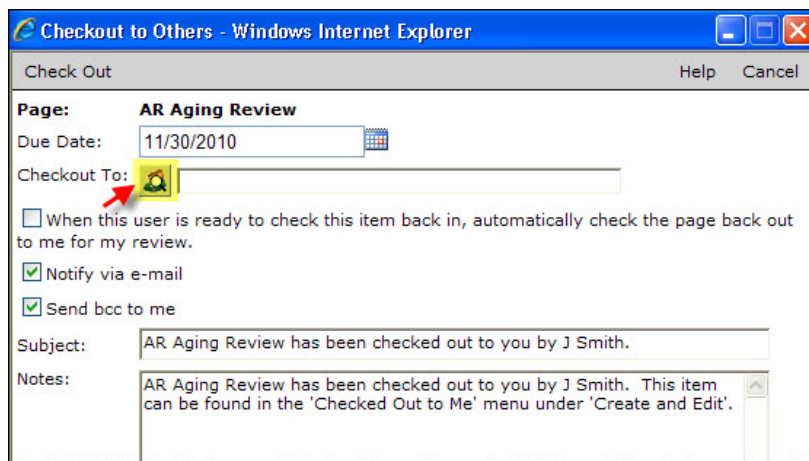
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There are a number of other ways you can begin taking advantage of this functionality. For more ideas, contact support@policyIQ.com.

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“Check Out To Other” Improvement

If you’ve ever wanted to check a Page out to another user who wasn’t already an Administrator or Editor on that Page, you’re going to appreciate this new feature. In the past, you needed to ensure that the user or the user’s Group was explicitly added to the Administrators or Editors property of the Page in order to be able to check the Page out to him. These time-consuming steps are no longer necessary. You can now check a Page out to any other Advanced User in your policyIQ site without needing to first give them local rights to the Page.



To do this, simply click on the new Lookup button on the Checkout to Others window and select the desired user. The selected user will then be added as an Editor on the Page and the Page will be checked out to them. Note that the current Administrators and Editors on the Page are still available to be selected using the drop-down selection to the right of the Lookup button on the Checkout to Others window.

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Expired Items Dashboard - “Show All” toolbar and filter

The “Show All” option on Expired and Expiring Items on your Dashboard has become much more useful in this release. The toolbar displayed after showing all of your Expired and Expiring Items now mimics the toolbar in Create And Edit>Published. You’ll now be able to toggle between “My Items” and “All Items” to display only those Pages that you Administer, and also the Stage>Renew Expiration toolbar option can be used to bulk update the Expiration Date on your Pages from the Home module.

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Searches include Forms

When performing a simple Search from the Home module, the results will now include approved Forms along with any published Pages that match your search criteria. This is very similar to the ability to index approved Forms to Home>Folders, as users must be listed as a Viewer on the Forms in order to return them in a search result.

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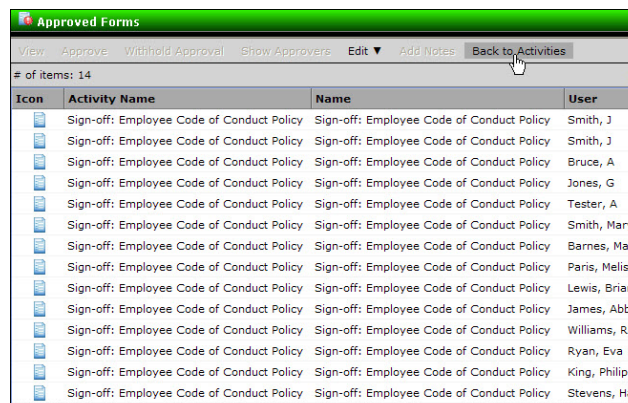
Run Form Templates/Form Lists on Open Date

In the previous versions of policyIQ, you could run a Form Template or a Form List with a future Open Date. However, the Forms were created and the related notifications were sent at the time of the Run action, not the Open Date. We realize this may have created some confusion, as the actual Forms were not available until the Open Date. With this release, the notifications will not be sent and the Forms will not be created until the Open Date.

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“Back to Activities” after drilling into the list of forms

In order to enhance navigation within the Activities menu, we’ve added a new toolbar option called “Back to Activities”. So now when you’re viewing the list of Open, Submitted or Approved Forms within Activities, you can use this toolbar option to quickly move back to the Activities view.



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New Form Reports Column Options

Forms Full Detail and Status reports have gained new column options for Folders and Viewers. Approved Form responses can be indexed to Folders in Home and assigned Viewers. These options can be setup as defaults on a Form Template, or modified later as part of a List Template or at the Activity level. These properties had not been reportable until now, and both column options will be available to add to all of your existing and new Forms Reports.

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Bulk Edit Form List Templates

If you've ever needed to update the destination Folders for your approved Forms on a Form List, or the users who can view those Forms, you previously had to make the required edits after running the Form List. In this release, we've added functionality that lets you make those updates all at once and prior to running your Form List. Within a Form List, we've added two new options, Change Viewers and Change Folders, to the Edit menu. You can now select all Form List Templates using shift+click to change these settings at once.



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Site-wide Report Categories

Do you use Report Categories to organize your reports? Many of you have told us that being able to set up Report Categories site-wide would make your lives much easier.

Now, Site Administrators (or users with similar custom Roles) are able to create a Report Category and designate the Category as "site-wide." Those Categories will appear in the left hand navigation of the Reports module for all of your Reporting users.

Don't worry – users can still create user-level Categories. This enhancement will not change your existing Categories, but you can now adjust them to share with other users. And keep in mind that a Report can be indexed into multiple Categories, whether they're user-specific or site-wide.

Create Report Category

Enter the name and description of the category in the field below and click **Save**:

Name:
Contract Management Reports

Description:

Check the checkbox if this category is visible site-wide:

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“Back to Attachment List” after drilling into the list of pages

Similar to “Back to Activities” in the Forms area, users evaluating their attachments within the Attachment List in Setup>System Setup>Database Management can now quickly return to the list of attachments by clicking “Back to Attachment List” from the toolbar.

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Enhancements for Importing Pages

The Print/Export option for content Templates in Setup has a new option for Export to CSV. This exports all field values and IDs to an Excel CSV file. When working through imports of large volumes of content, this will make formatting and gathering data much easier to accomplish.

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New User Alert Message

For our Subscription clients, we’ve added a new notification message when adding new Standard and Advanced users. This notification is a simple reminder that additional charges can apply when adding new users to your site.

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E-mail Settings

With this new release, all of the e-mail generated from your policyIQ site will come from the same source. Due to the amount of e-mail that can be generated from your policyIQ site, our team would like to make it as easy as possible for your IT Group to recognize e-mail as coming from a trusted business partner in policyIQ. To that end, our technical team has provisioned a dedicated policyIQ mail server to send e-mail generated from your hosted policyIQ site. Please feel free to contact our **[Support](#)** team if you have any questions on receiving e-mail from policyIQ.

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User Import E-mail Notification

When you import a batch of new users using the Import tool, you will now have the option of sending an email to those new users. Additionally, you’ll be able to specify the date on which this email should be sent, in case you don’t want this to happen immediately. This e-mail reminder can include a custom Subject and Message, and will include their username and password by default.

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