## **SA1360**

Roadmap and Recent Enhancements

CustomerConnect 2025





## Presenters



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# Recent Enhancements





Recent
Portal
Enhancements

- Open Portal from the Navigation Menu [2025.2]
- Navigation Panel in Risk Portal Now Collapses and Expands [2025.2]
- Easily Identify Keyword Term in Risk Portal Policy Search Results Description [2025.2]
- New Division and Folder Filter for Policy Search in Risk Portal [2025.3]
- View Related Policies in Risk Portal Policy Search Results [2025.3]





Recent
Portal
Enhancements

- Configure Division and Folder Filters for Auto-Authenticated Portal ExternaLinks [2025.3]
- New Module Access Options for Risk Portal [2025.3]
- Demonstration





Select/Deselect Buttons Enabled for Updating Employee's Groups and Home Page Tabs [2025.3]

賣買× Select Home Page Tab **Home Page Tabs**  $Q \times Q$ Keyword/Phrase Search » **Y** Filter By Any Field ▼ Contains ▼ Enter value DESCRIPTION **ACTIONS** NCAA Compliance Dept Third Party Risk Deselect Case Management Select Case Manager Example Select Policy List Deselect Policy Advanced Search - MC Select Tab for Adv Search Catalog Deselect Online Edit Policy List Select Online Edit Policy Catalog Select

Recent

**Enhancement:** 

Select and

Deselect

**Buttons** 





Recent
Risk
Intelligence
Enhancements

- Risk Intelligence Reports for RCM Content Item Can Include Title [2025.3]
- New Risk Intelligence Virtual Evidence Room Master Report [2025.3]





# To Do List Items Streamlined for Default Module Type [2025.5]

## To Do List Gifts And Hospitality Manager / Gift / Default Gifts And Hospitality Manager / Gift Limit / Default Meetings Manager / Meeting Attendee / Default Policy Manager / Policy / Default Third Party Risk Management / Business Partner / Default Third To Do List Gifts And Hospitality Manager / Gift Meetings Manager / Meeting Attendee Third Party Risk Management / Business Partner

Recent
To Do List
Enhancements





# Roadmap

#### SAFE HARBOR STATEMENT

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## Updated Priorities for 2025 and Beyond



Q2 Q3 Beyond



#### Search

#### **Search Result Enhancements**

Enhance the search result experience through the addition of stemming, keyword highlighting, and attachment searching.

#### **Portal Enhancements**

More intuitive policy search experience via the portal and enhancements to the portal.



#### **Employee Experience**

#### **Employee Experience**

Single location for employees to view and complete any SAI360 assignments from learning coursework to Conflict of Interest disclosures, as well as the appropriate employees accessing dashboards and related information.



#### **Incidents**

#### **Whistleblower Reporting**

Ability for end users to report issues, anonymously if desired, as well as receive updates on the issues over time.



#### Data Management

#### **Management Export all Published Revisions**

Ability to export all published revisions of policies within a date range.

#### **Data Retention**

Configurable tool to allow administrators to setup and manage data retention rules

Introduce **AI**-powered capabilities.

#### **Pre-configured Master Risk Intelligence reports**

Reports designed to reduce effort to build



## Search Enhancements

- Due to Search related feedback, we have been working to enhance the search experience within:
  - Policy Search Plug-in
  - Contract Search Plug-in and Contract Addenda Search Plug-In
  - Analytics | Search, and
  - Portal Policy Search
- We have changed the search engine we use and added new functionality, that we will share on the next slides.





Search
Enhancements:
Stemming



- We have added the concept of stemming to Search.
- This means that we break down the keyword(s) and not only search on exactly what the searcher input but related words too.
- For example, if the keyword was "clean" we would return results that may include any of the following: clean, cleaning, cleaned, and other related words.



Search
Enhancements:
Attachments



- This means that we are now indexing the contents of any attachment files added via the paperclip icon.
- We know that clients may use attachments for various purposes.
  - Some organizations may want their attachment files searched, while others do not.
  - When we get closer to adding these new Search enhancements to your database, we will reach out to you regarding searching attachments.





# Search Enhancements: Attachments

- If this option is enabled:
  - it is enabled for all modules.
  - There may be more results than previously.
- Note: We are not including the ability to search within attachments in the Portal Policy Search based on client feedback.



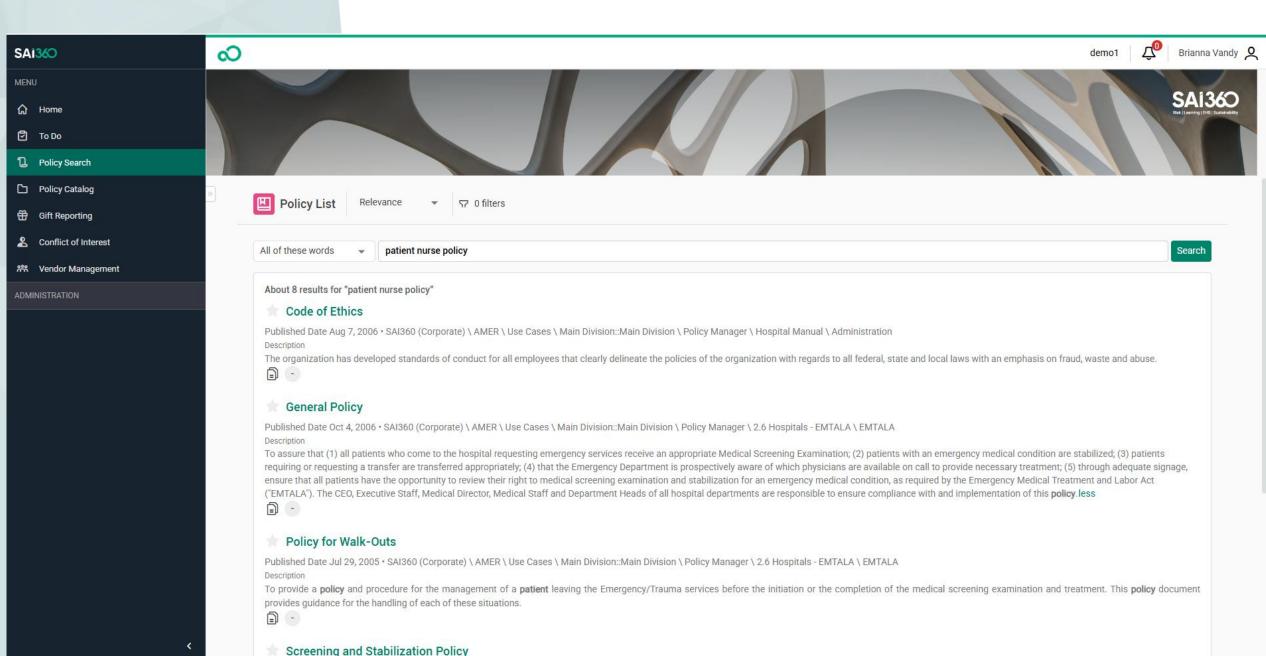


Search
Enhancements:
Keyword
Highlighting



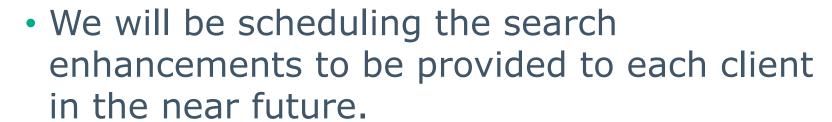
 We have added to the Portal Policy Search the highlighting of the keyword to easily locate the keyword.







Search Enhancements



- You will receive an email with regard to your search date.
- In the meantime, we have two specific FunTrain events coming up:
  - Portal Policy Search June 10
  - Search Enhancement Functionality June 16
  - Let me know if you want to register for these.





Pre-Configured
Risk
Intelligence
Reports

- We continue to provide generic, preconfigured reports to be used within the Risk Intelligence module.
- They may be copied and downloaded an unlimited number of times as needed.





Employee Experience

- We are working to provide organizations a single application to access all their Compliance needs as well as their Training assignments. One login to access all of this together.
- Tomorrow we will have a session that goes into more depth on this enhancement.





Whistleblower Reporting

- We are working to provide organizations the ability to provide their employees and clients a mobile friendly method for intaking whistleblower reports anonymously and receiving status updates.
- Tomorrow we will have a session that goes into more depth on this enhancement.





Export
All
Published
Revisions



- A new option will be added to the Data Export feature which will allow you to export all of the published revisions of an object within a date range.
- Currently, a user can only export the most recent published revision of an object.
- For example, if a policy had two revisions which were published during the past 18 months, using the new option, the export results will contain both revisions, not just the most recently published revision.
- This new capability will alleviate the need to manually search for past published revisions.



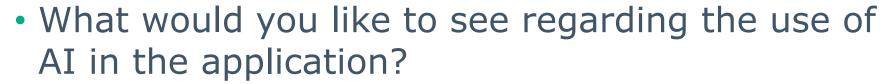
#### **Data Retention**

- In the future we would like to create a new feature that will allow organizations to self serve on their data retention (or data purge) needs.
- Clients would be able to select a module and criteria for the permanent deletion of data.
- What would you like to see?



Note: No work has been started on this endeavor yet. We are just collecting your feedback.





- What modules would you like to see AI applied to?
- What processes would you like to see AI applied to?
  - Workflow history analysis for duration information?
  - File creation? File analysis and/or summary?
  - Populate fields based on file contents?
- What is your organization's stance toward the use of AI?

Note: No work has been started on this endeavor yet. We are just collecting your feedback.



AI



# Questions





# Ideas Portal





#### Open Ideas

 On the next slides we will share with you recently submitted ideas that are open for voting.

 After describing the idea, you can vote for it using a number from 0 to 10 (10 being highest).

We will then document your votes.





Use Artificial Intelligence to complete fields and make language suggestions

- Where: Globally
- Use AI to pull data from files (contracts, policies, regulatory content, etc) to fill in data fields automatically rather than manually by responsible party.
- Use AI to make suggestions on legal language or changes to text.





Email creates new RCM Content Item

- Where: Regulatory Compliance Manager
- Add the ability to send an email to a specific SAI360 email address in order to create a new content item.
- One time mapping may be required.





Limit ability to delete or replace attachments

- Where: Attachments
- Would like to restrict the ability to delete attachments or edit them.
- Still want the ability for any to add new attachments.
- Want to prevent accidental editing or deleting of attachments when just asking for information.





Date Field Configuration

- Where: FA3 modules
- Ability to optionally set logic around date field contents and display to the user a message if they are not within the logic.
- Example: Remove the ability to set a "Scheduled Revision Date" in the past.





Add Scheduled Reports to Modify Employee

- Where: Maintenance | Employee
   Management | Employees
- Add the list of which scheduled reports an employee is a recipient for to the Modify Employee pages.
- Furthermore, allow one to add or remove reports from this location (in addition to performing this within Reporting).





Auto-Generate ExternaLinks

- Where: FA3 modules
- Ability to click an action and have an externalink URL be created and the URL to be placed in a specific field.
- Ability to do this in bulk also.
- Some one time set up will be required.





Add Task CC as a message block for Task Manager

- Where: Messaging for Task Manager
- Add Task CC as a message block to be used with the Task Manager module.





Create Subscriptions at the Sub Agency level for Federal Register

- Where: Regulatory Compliance Manager |
   Content Subscriptions
- Add the ability to subscribe to subagencies within the Federal Register.
- Example: Currently you can subscribe to "Department of Labor" but being able to subscribe to "Employee Benefits Security Administration" is more helpful.





#### **Next Session**



 As part of the **next** session, start thinking about generic product questions you have for group discussion.

 We will try to address as many as we can at the latter part of the next session.





# Thank you

