

Tips and Tricks

CustomerConnect 2025

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Presenters



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Attachment Enhancements

You can control the order of attachments, see the last updated date, as well as the name of the person who attached the file.

Attachments















Policy

☒ Accounts Payable 2

Attachment List

New

ORDER ▲	NAME	ATTACHED BY	TYPE	CLASSIFICATION	DATE ATTACHED	LAST UPDATED	SOURCE	ACTIONS
1	  R12645CP.pdf	 Morales, Abigail ●	File		5/20/2024	---	Policy	Actions ▼
2	  MM13608.pdf	 Morales, Abigail ●	File		5/20/2024	5/9/2025	Policy	Actions ▼
3	  r13135cp.pdf	 Morales, Abigail ●	File		5/9/2025	---	Policy	Actions ▼
4	  Flyer_2026RA.pdf	 Wright, Zoya ●	File		5/9/2025	---	Policy	Actions ▼

Close

Assessments: Create Object Rule

- Did you know that you can use workflow to create objects based on an assessment assignee's response to a question?
- Example:
 - You are conducting an annual Risk Assessment.
 - If an assignee discloses that they are aware of theft / fraud / asset misuse, then a workflow rule will to create an Incident to track and manage the investigation and follow-up.
 - The rule only executes if the assignees says yes to knowledge of an issue.
- **Demonstration**



Assessments: Carry Forward Responses

- The ability of an assignee to Carry Forward Responses to the current assignment from a previous assignment, can be enabled when the questionnaire is created.
- This allows the previous response, attachments (if present), and comments (if present) to be carried forward to the current assignment.
- Example: Your organization's Conflict of Interest questionnaire is the same each year. The same questions are used each year. You may wish to allow those who completed it last year to carry forward their previous responses to save them time.



Assessments: Carry Forward Responses

- Tips about using the Carry Forward functionality.
 - This option applies only to questions that are added to a questionnaire. If there are questions that were already added to the questionnaire before you select the **Default Questions** to "**Allow Carry Forward Responses**" checkbox, then you must manually enable carry forward for those questions.
 - If you enable carry forward for questions on a questionnaire and then later clear the Default Questions to "Allow Carry Forward Responses" checkbox for the questionnaire, then carry forward remains enabled for the questions on the questionnaire. To disable carry forward, you must manually clear the Allow Carry Forward Responses checkbox for each question.
 - You can edit individual questions and clear the **Allow Carry Forward** option as in some cases you may want the assignee to be required to update that information each year. i.e. demographics



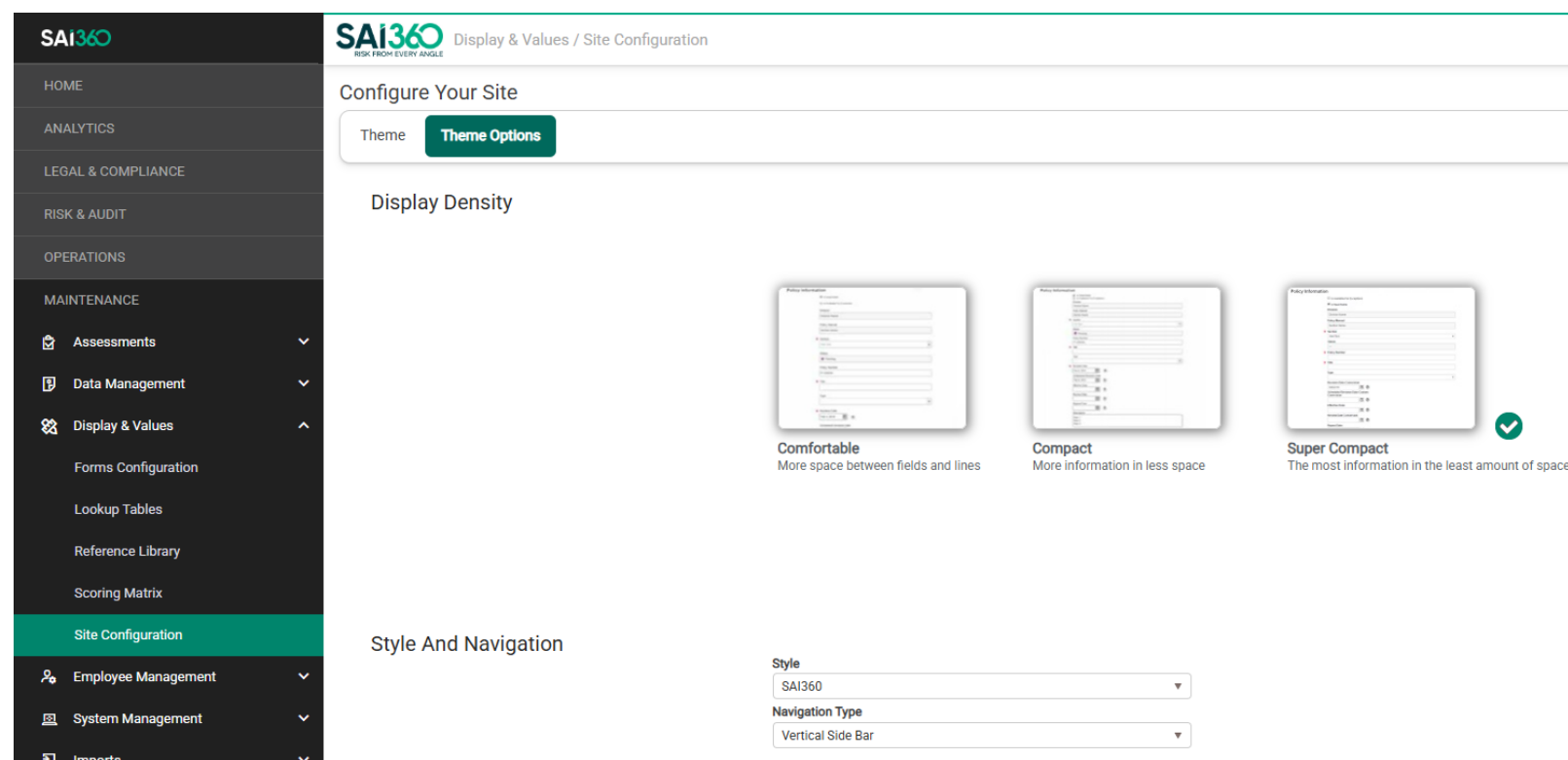
Assessments: Carry Forward Responses

- Tips about using the Carry Forward functionality.
 - Use Read Only text elements to add question-specific instructions, background, context, URLs, etc. which may need to change from year to year. These CAN be edited without 'breaking' carry forward – despite the warning message.
 - Leverage external links to Policies, documents, etc. in Read Only text elements, then simply update and publish the document to keep questionnaire up to date.
 - Keep the actual question text simplistic to avoid the need to edit it in the future as doing so will break carry-forward.
 - Copying the Questionnaire will also break carry-forward.
 - It is the Editing and then saving of changes to either the Question text, Response text, the number of response choices, or a Response(s) properties which breaks carry-forward.



More Modern Menu: Vertical Navigation

- Looking for a more modern view?
- Move to the SAI360 style and Vertical Side Bar view.
- Do you already use the Vertical side bar?



SAI360 Display & Values / Site Configuration

Configure Your Site

Theme **Theme Options**

Display Density

Comfortable
More space between fields and lines

Compact
More information in less space

Super Compact
The most information in the least amount of space

Style And Navigation

Style: SAI360

Navigation Type: Vertical Side Bar

Employee Integration

- If you are currently using IMA to load and update employees to your database, consider moving to an Employee Integration.
- Advantages:
 - Can have your HRIS system post directly to SAI360
 - No need to install IMA on a PC. PC is not 'tied up' for hours.
 - Can send full files as frequently as needed and employees are added/updated
 - Can add Employee Relationships and Activate/Deactivate users
 - If your HRIS system can produce a CSV file and post it to a URL, you're all set.
 - Many otherwise manual Employee configuration tasks are eliminated.
 - Employees access in SAI360 is deactivated immediately after HRIS deactivation.



Profiles

- Use Profiles to standardize the provisioning of Employees
 - Module Access, Division Access, Group membership and Home Page Tabs all in one step!
 - Conditional Profile Membership allows for Automation!
 - Doing this allows you to tell your IS Security team (and Auditors) that SAI360 uses Role-based security.
 - Think: every manager gets 'x' and only 'x'
 - No more misconfigured Employees, nor 'snowflakes'
 - A profile report routed for review periodically is your evidence of conducting Access Reviews as required by many regulations. (HIPAA, GLBA, SOX, etc.)



Portal and Conflict of Interest

- Use the Portal as the primary method by which COI Assessment Assignees interact with the system.
 - Assignee can Start their questionnaires from there.
 - Assignee can Review their submitted questionnaires from there.
 - Assignee can Update their submitted questionnaires from there.
 - Very modern UI/UX



Change History

- Did you know that if you or another user accidentally deletes an FA3 object, a system administrator or user with the needed access can restore it?
- The Change History functionality allows one to see the audit events of objects as well as undelete FA3 objects if needed.



Workflow Entry Conditions

- Has an object ever started a specific workflow step incorrectly based on other object's field values?
- If so, you may want to consider adding workflow entry conditions to various workflow steps.

Custom Error Message

You cannot start the Fraud step unless the incident type is Fraud.

Condition Group

Component

Incident ▼

Field

Type ▼

Operator

Is Equal To ▼

Field Type

Specific Value ▼

Value

Fraud ▼



Add Condition Group

Remove Condition Group

Batch Edit

- Have you ever needed to change the Responsible Party of several contracts to the same person?
- Or the type field of several risks?
- Or perhaps you want to mass close several incidents at one time?
- In many cases, these and other examples can all be completed via the batch edit functionality for FA3 objects.



Bulk Edit

- Select the checkbox for multiple objects.
- If you do not see the checkbox, the “Allow Batch Actions” option will need to be enabled for the list you are working with.

Division
SAI360 (Corporate)

Incidents

<input checked="" type="checkbox"/>	ID	NAME	STATUS	RESPONSIBLE PARTY*	TYPE	DATE RECEIVED ▾	INCIDENT DATE	ACTIONS
<input checked="" type="checkbox"/>	876766692555	Labor Incident	Intake/Triage	Sloman, Sara	Workplace Safety and Regulatory Issues	10/31/2024	10/1/2024	Edit Delete Attach Copy/Move Comment Self Investigation Assign to SIU Assign to Enterprise Fraud Revise Return to Triage Send for Manager Review
<input checked="" type="checkbox"/>	876766692540	Unused Medication Disposal	Intake/Triage	Sloman, Sara	Workplace Safety and Regulatory Issues	1/25/2024	1/9/2024	Actions ▾
<input checked="" type="checkbox"/>	876766692537	Incident 1	Intake/Triage	Manager, Case		11/14/2023	-	Actions ▾
<input checked="" type="checkbox"/>	876766692536	Patient Concern	Intake/Triage	Manager, Case	Patient safety	11/14/2023	11/9/2023	Actions ▾
<input checked="" type="checkbox"/>	876766692532	Stolen Laptop	Intake/Triage	Powell, Aaron	Privacy & Security	10/24/2023	10/24/2023	Actions ▾
<input checked="" type="checkbox"/>	125	Bus Incident	Intake/Triage	Sloman, Sara	Employee safety	10/10/2023	9/25/2023	Actions ▾

Check the box next to each field that you wish to change for each of the 2 selected items.

Incident Information


Division Info

Division VV

Division

Division VV

Folder

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Workflow Template

Status


#

Name

Description

☒ Resp. Party

Wright, Zoya

☐ Date Started

☐ Date Received

☐ Incident Date

☐ Type

☐ Company

☐ Product

☐ Source

Time Received

8:00 AM

☐ Expected Resolution Date

SAI360 Academy

- Courses are designed to assist current System Administrators in daily tasks for managing and maintaining SAI360.
- Course offerings are open to all existing clients and customers.
- To register for a course please contact your Account Manager or if you have any questions about the academy, please send an email to academy@sai360.com.
- Available Trainings:
 - System Administrator Training
 - Introduction to Compliance (On Demand): Great for new users to the application.

