Riskonnect ESG PDF

Created on: 04/22/2025 6:45 am PDT

Table of Contents

Logging in to Riskonnect ESG

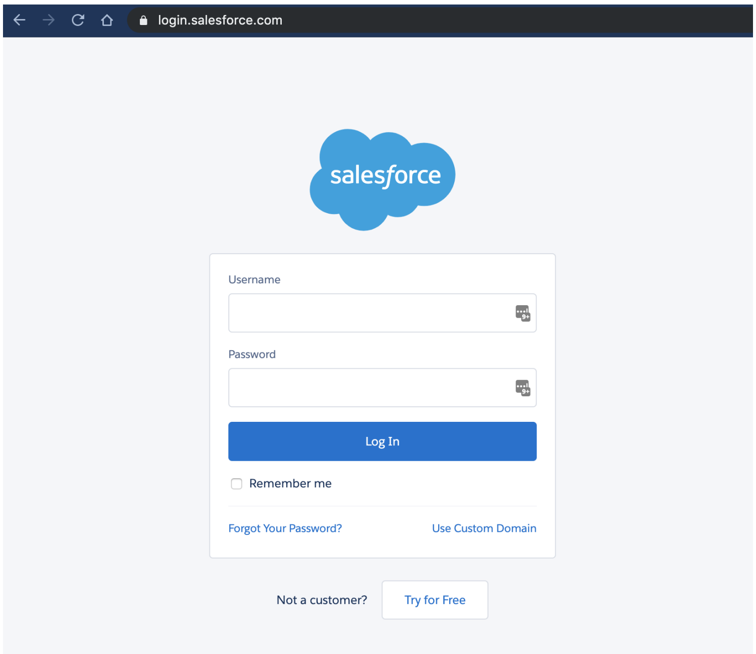
Last Modified on 07/28/2022 11:43 am PDT

In order to access Riskonnect ESG on Salesforce, you will need to use your username and password shared with you via Salesforce. When you are added to the Riskonnect ESG Network, you will receive your credentials in an email from Salesforce.

If you have received the email to join Salesforce and you have never logged in, the Forgot Password? link will not work. Please Log a Case with Riskonnect ESG Customer Support to get a new invite.

To log in to Riskonnect ESG (on Salesforce):

1. In your web browser, go to .
2. Enter in your username and password and click **Log In**.



If you have entered in the correct credentials, you should land on the Riskonnect ESG Application in your instance of Salesforce.

If you are having trouble logging in to Riskonnect ESG, please click on the Forgot Your Password? link and you will receive an email from Salesforce with password reset instructions.

If you do not know the username or password **and** do not have access to the email address associated with your company's Salesforce Org (i.e. the previous Riskonnect ESG administrator has left the company), you will need to Log a Case with Riskonnect ESG Customer Support to help recover it.

What browsers can I use to access Riskonnect ESG?

Last Modified on 05/30/2022 5:44 pm PDT

A modern, secure browser is vital to using the Salesforce-based Riskonnect ESG platform. Using an unsupported browser will result in unexpected behaviors, errors, and may not allow certain features to function at all.

Supported browsers:

- Google Chrome version **73.0+** *(Latest release strongly recommended)*
- Mozilla Firefox version **65.0.2+** *(Latest release strongly recommended)*
- Apple Safari version **12.x+** *(Latest release strongly recommended)*

Unsupported browsers (DO NOT USE):

- Microsoft Internet Explorer (IE)
- Netscape Navigator
- Mosaic

Resetting Your Password

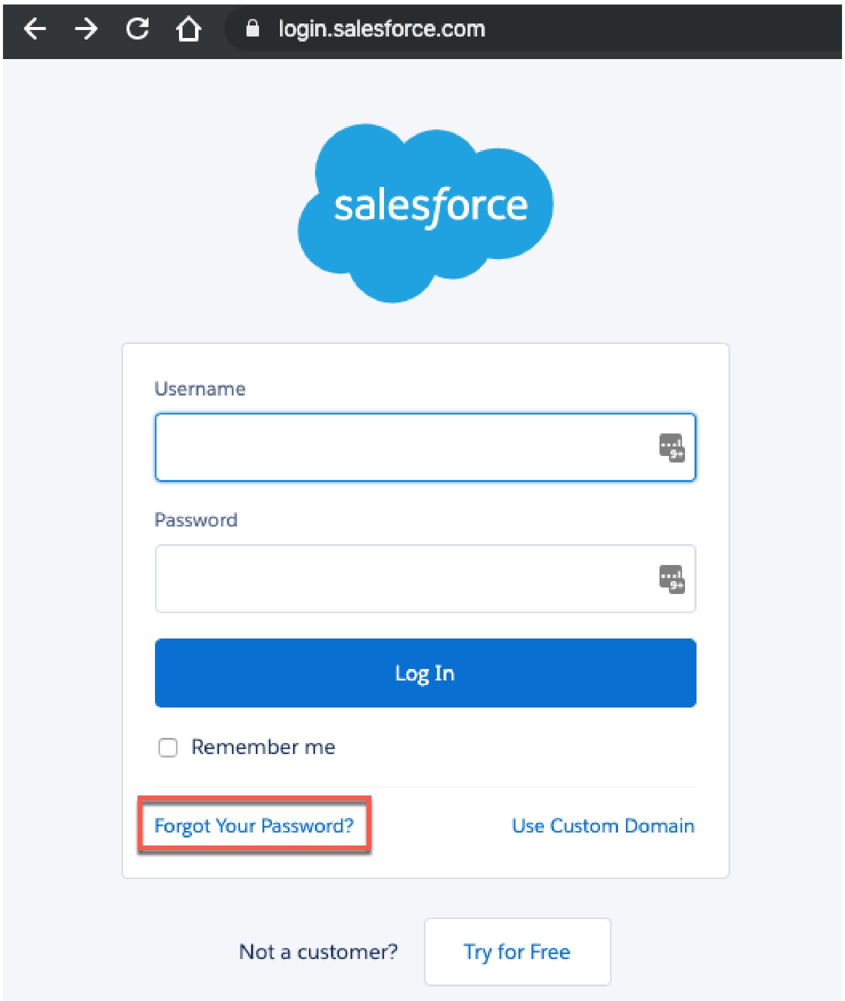
Last Modified on 09/13/2022 1:40 pm PDT

In order to reset your password for Riskonnect ESG on Salesforce, you can use the Forgot Your Password? link on the login.salesforce.com screen.

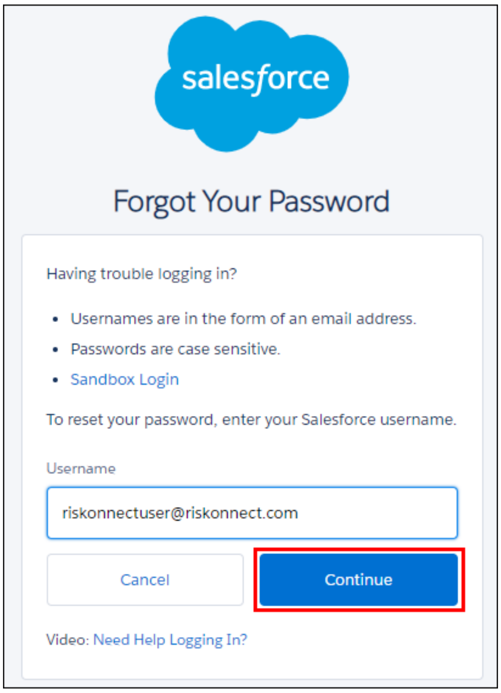
> If you have received the email to join Salesforce and you have never logged in, the Forgot Password? link will not work. Please Log a Case with Riskonnect ESG Customer Support to get a new invite.

To reset your password:

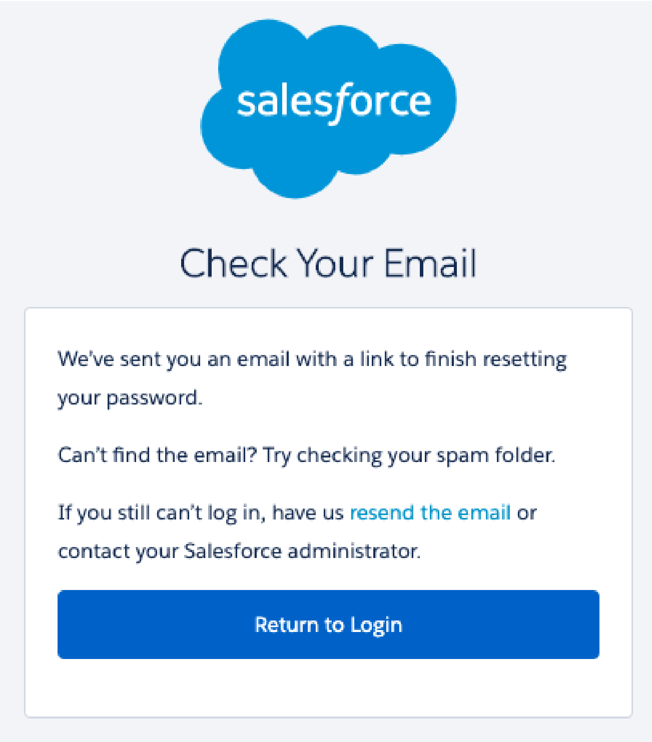
1. In your web browser, go to .
2. Click **Forgot Your Password?**



3. Enter in your username and then click **Continue**.



4. After you have triggered a password reset, you will need to check your email for a password reset link.



If you do not know the username or password **and** do not have access to the email address associated with your company's Salesforce Org (i.e. the previous Riskonnect ESG administrator has left the company), you will need to Log a Case with Riskonnect ESG Customer Support to help recover it.

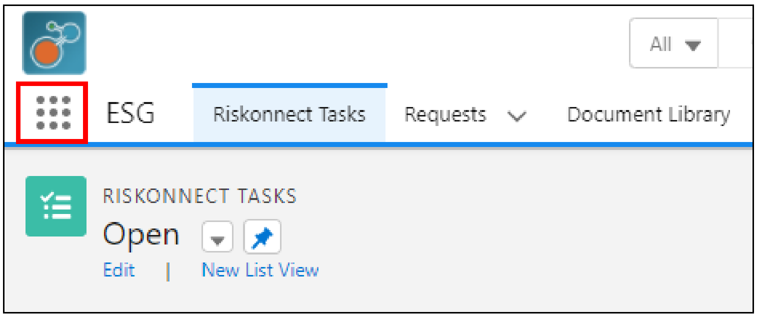
Setting Your Communication Preferences

Last Modified on 06/03/2022 5:41 pm PDT

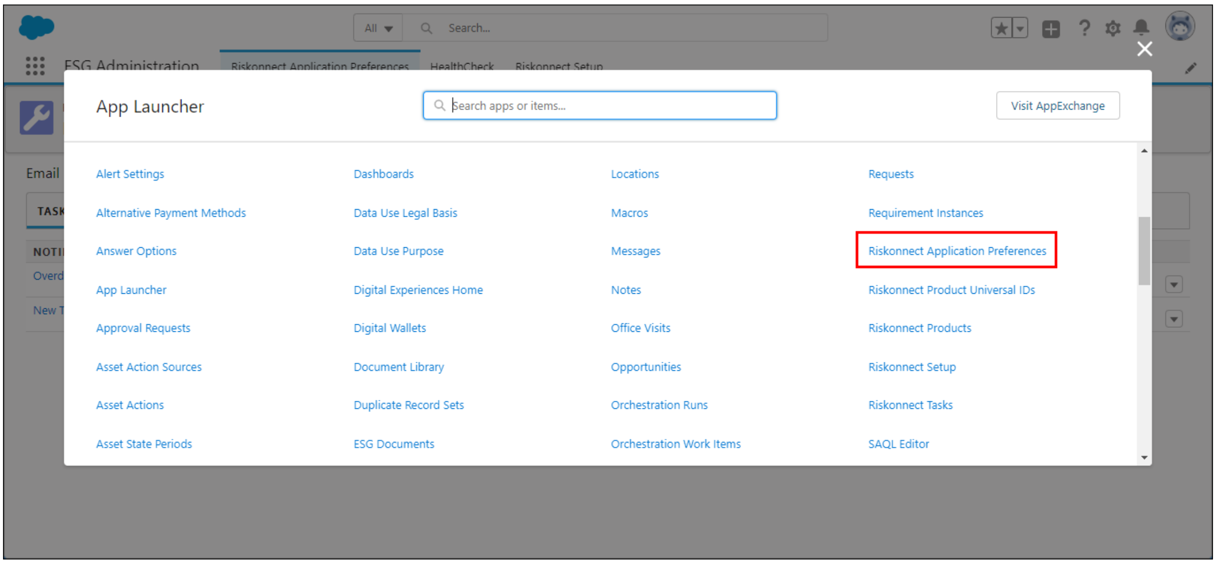
As a user of Riskonnect ESG, you can choose to receive email notifications for new Riskonnect ESG Tasks or you can turn those emails off. This is an individual user setting within your Riskonnect ESG environment.

To set your email communication preferences:

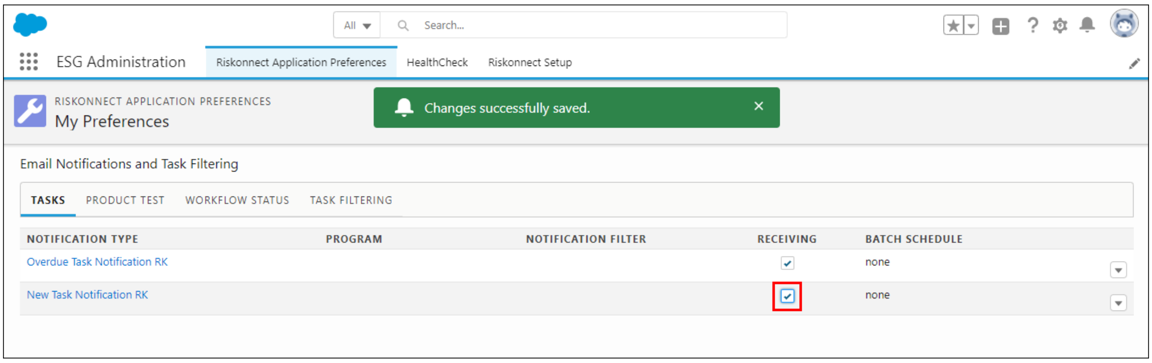
1. In the Riskonnect ESG application, click on the waffle.



2. From the tab selection menu, click on **Riskonnect Application Preferences**.



3. In the Email Notifications and Task Filtering table, select the **Tasks** tab.
4. Deselect the type of email you want to either turn on or turn off.
   - **Overdue Task Notification** - This is an email that will automatically get sent to you when an Riskonnect ESG Task is due "today". You will also receive this email when the original due date is 7 days ago and every 7 days after the original due date.
   - **New Task Notification** - This is an email that automatically gets sent to you when you have received a new request or an update to a request throughout a workflow.
   - **Trading Partner Invitation** - This is an email that automatically gets sent to you when a new trading partner connects to you within the Riskonnect ESG Network.



After you make your updates, you will see a green notification indicating that your changes have been saved successfully. If you have deselected one of the notification types, you will not receive automated Riskonnect ESG emails in those scenarios.

Salesforce User Email Verification

Last Modified on 04/17/2023 4:29 pm PDT

For Riskonnect ESG Network Users (ICIX)

Why do I need to verify my email address?

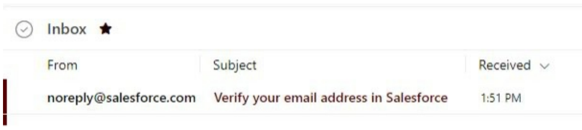
- Salesforce will enforce user email verification starting in June 2023.
- Riskonnect can help you get ahead of Salesforce email verification by systematically sending you the verification email ahead of Salesforce enforcement.
- The goal of email address verification is to enhance protection for your Salesforce data.
- By not validating your email address, you will have missed Salesforce system generated emails. For example, requests/request reminders.
  Post validation and go forward you will be cleared to receive system generated emails.

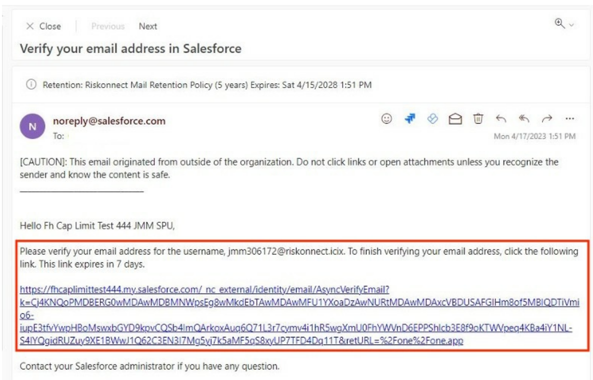
What action is required of me when I receive the email address verification email?

- This is a one-time user email verification requirement
- Follow the directions in the received email
- The link expires in 7 days

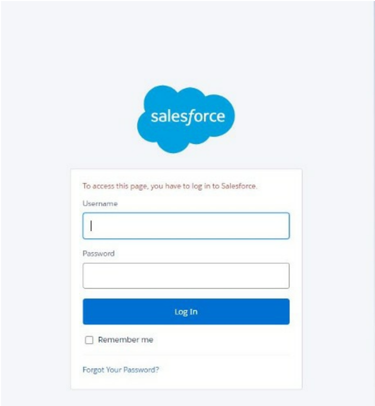
What steps do I take to verify?

1. You will receive a verification email from Salesforce such as the following:





2. Click on the link to verify.
   You have completed the verification requirement! You will then be directed to the login page where you can proceed to login or close the page if you do not need to log in.


salesforce
To access this page, you have to log in to Salesforce.
Username
Password
Log In
Remember me
Forgot Your Password?

Salesforce Multi-Factor Authentication (MFA) FAQs

Last Modified on 05/22/2023 8:14 am PDT

What is multi-factor authentication (MFA)?

It's important to implement strong security measures to protect our business, our data, and our customers.

One of the simplest, most effective ways to help prevent unauthorized account access and protect our Salesforce data is through employing multi-factor authentication, or MFA for short. Usernames and passwords alone don't provide sufficient safeguards against unauthorized account access. MFA adds an extra layer of protection against threats like phishing attacks, credential stuffing, and account takeovers.

MFA enhances the security of the Salesforce login process by requiring users to verify their identity with two or more pieces of evidence (or "factors") to prove they are who they say they are.

This additional layer of security will require users to provide two forms of authentication before accessing the system, ensuring that only authorized individuals can log in.

Is multi-factor authentication (MFA) a Riskonnect product solution?

MFA is not uniquely a Riskonnect product solution but it's a secure authentication method to gain access to an application. Salesforce MFA is a feature that is enabled by Salesforce to ensure users can authenticate themselves more than just a username and password.

When will MFA be enabled for my user account?

MFA will be turned on in your orgs in Salesforce Spring '23 (January-February 2023) through Spring '24 (January-February 2024) releases.

How do we know that MFA is turned on and what do we do?

Users logging into their orgs will be asked to set up an MFA method of their choosing. Users will receive an MFA challenge each time they log in directly with their username/password. The default verification method is the Salesforce Authenticator mobile device application. Other options are third-party authenticator apps, security keys, and built-in authenticators.

When Salesforce turns on MFA for a trading partner org is there a rollback plan?

We have a rollback plan if there is a customer request to do so. Riskonnect can be notified with the Salesforce Org ID and we can turn the feature off temporarily.

If log in using SSO, does MFA impact me?

Salesforce will not act on your behalf to enable MFA for your SSO identity provider. Nor does Salesforce have plans to block access to Salesforce products or trigger MFA challenges if your SSO service does not require MFA. According to Salesforce, this policy could change in the future.

When Salesforce enables MFA, is there a temporary option for users to opt-out?

In general, there is a 30-day grace period that the user can initiate by declining on their first login. After that period, MFA is enabled by Salesforce.

What are the available authenticator apps?
Salesforce Authenticator and third-party time-based one-time password (TOTP) Authenticator apps such as Google Authenticator, Microsoft Authenticator, or Authy.

How can I download an authenticator app?
Click here for more detail on using the Salesforce Authenticator App: Download the Salesforce Authenticator Application. You do not have to use the Salesforce Authenticator App and can use any Third-Party Authenticator Application that meets the Salesforce requirements listed here: Third-Party Authenticator Apps.

If I don't have access to Google Play, how can I download an authenticator app?
For users with no access to the Google Play Store, please use a Third-Party Authenticator Application that meets the Salesforce requirements listed here: Third-Party Authenticator Apps.

Are there instructions on how to set up an authentication app?
Click here for a video walkthrough on setting up the Salesforce Authenticator Application: How to Use Salesforce Authenticator for MFA Logins.

I have installed the authentication app, but I need assistance with setting it up. Who do I contact for support?
Please contact the Riskonnect Support team: https://riskonnect.com/support/

Will Salesforce permanently enforce MFA and if so, when?
The projected Salesforce MFA enforcement date can be found here: Multi-Factor Authentication (MFA) Enforcement Roadmap.

If I have any additional questions who do I contact?
Please contact the Riskonnect Support team: https://riskonnect.com/support/

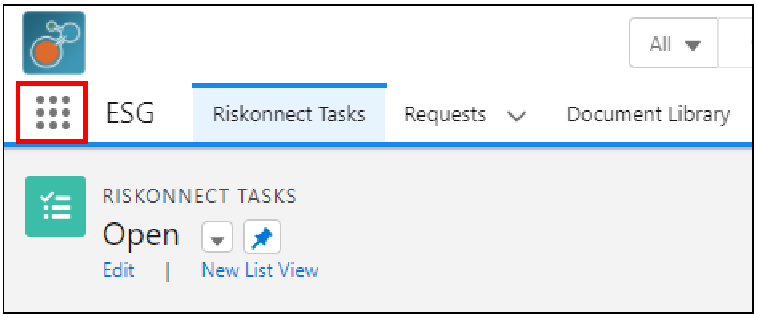
Riskonnect ESG Tasks

Last Modified on 06/03/2022 5:29 pm PDT

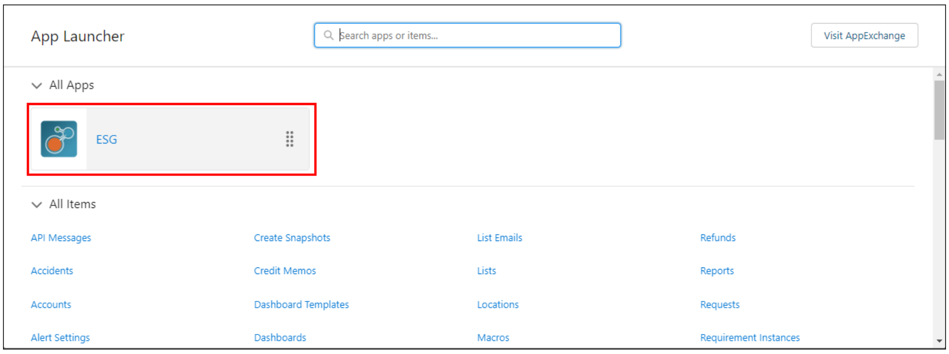
The main place in Riskonnect ESG where you spend most of your time is on the Riskonnect Tasks page. This page is the primary location for responding to requests sent to you by your customers in Riskonnect ESG. On the Riskonnect Tasks page, you might see tasks that ask you to fill out simple forms, more data-rich Test Request Forms, tasks for rejected forms from your customers, and even tasks that ask you to view a document (file) that was shared with you.

To access the Riskonnect Tasks page:

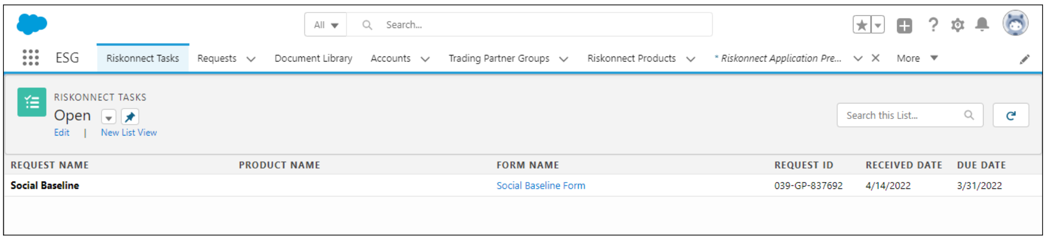
1. Log in to Riskonnect ESG.
   If you need help logging in, please view the Logging in to Riskonnect ESG help article.
2. Click the waffle icon in the upper left of your screen.



3. Click View All.
4. Select the ESG application from the App Launcher.

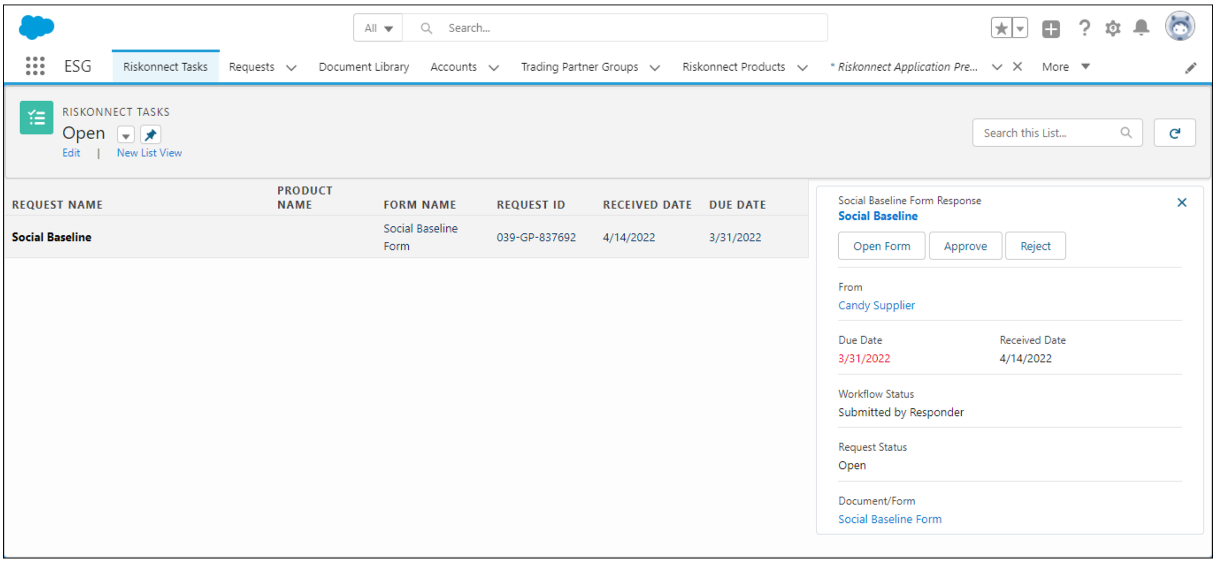


5. Select the Riskonnect Tasks tab if it is not selected by default.



To respond to a Riskonnect Task:

1. On the Riskonnect Tasks list, click on the name of the request in the first column. A right hand panel is displayed that enables you to take action.



2. Depending what step the request's workflow is in, you will see different action buttons. After you complete a Riskonnect Task, the task will disappear from your Open Riskonnect Tasks list.

Adding New Members to the Riskonnect ESG Network

Last Modified on 06/03/2022 5:42 pm PDT

Unfortunately, adding a Trading Partner is not a task that you can do on your own (yet!).

If you are adding just one or two TPs, just open a Support Ticket with the TP's information:

- Business Name
- Full address
- Contact Name
- Contact Number

If you need to add several (or many!) TPs, supplying this information in a CSV-format spreadsheet is required, with a row per TP.

Riskonnect ESG New TP Sheet

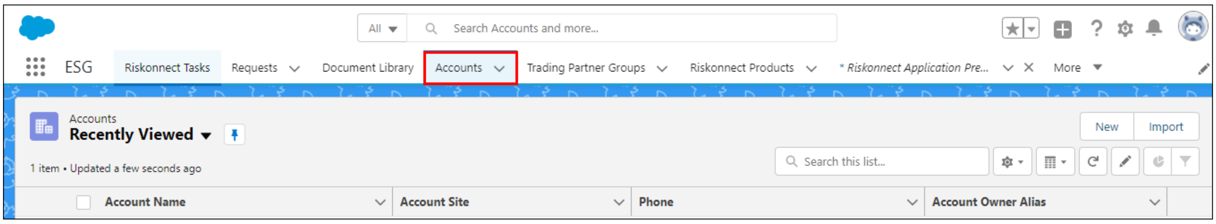
Connecting to Trading Partners

Last Modified on 05/30/2022 6:40 pm PDT

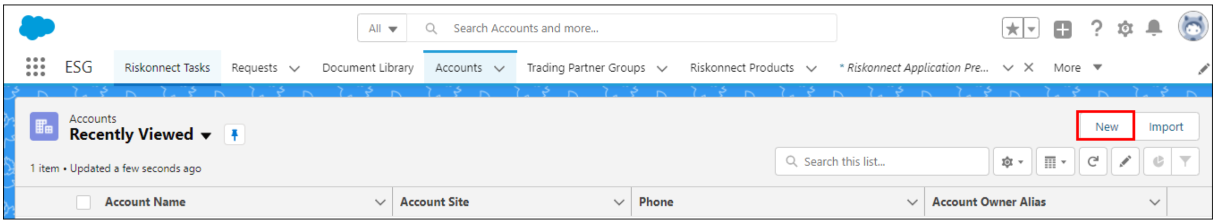
In order to see if your trading partner is a member of the Riskonnect ESG Network, you can use the Account Search feature in Riskonnect ESG to perform a network-wide search. If you find the trading partner you are looking for, you can connect to that trading partner by creating a Trading Partner Relationship.

To search for a trading partner:

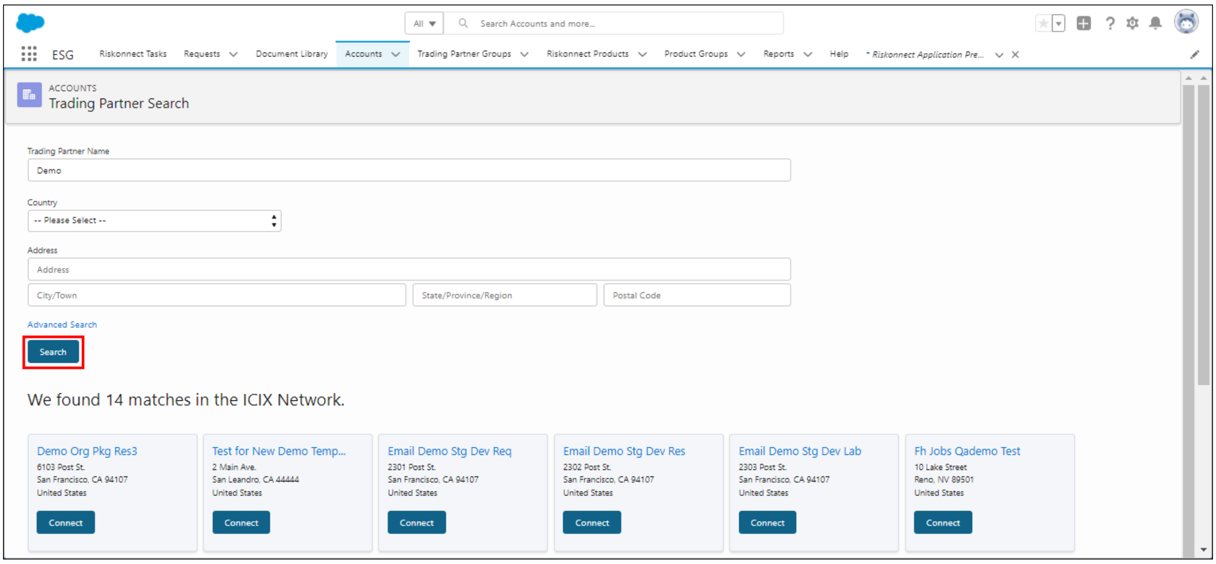
1. Log in to the Riskonnect ESG application and go to either the Accounts or Trading Partners tab.



2. Click **New**.



3. Enter in your search criteria, and then click **Search**.
   If the trading partner you are looking for is already a member of the Riskonnect ESG Network, you will see them displayed below your search.

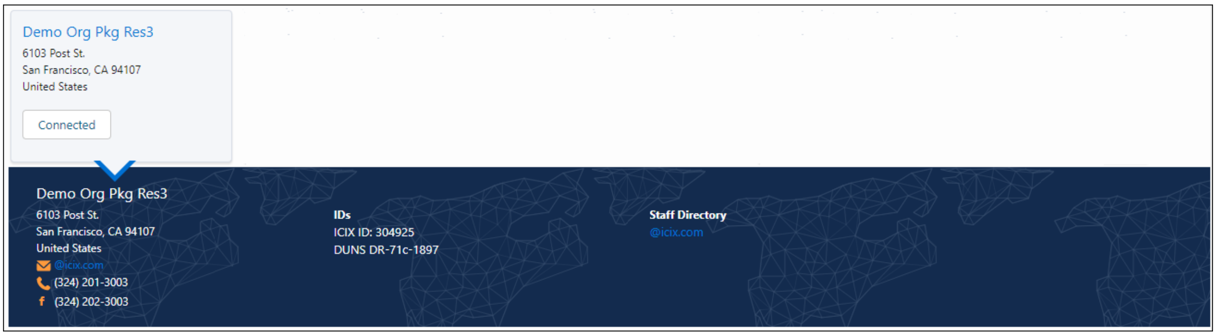


To connect with a trading partner:

1. In the search results section, click **Connect**.
   To view more details on the account, click anywhere in the grey results box.
2. On the Define Your Trading Partner Relationship screen, enter in the following details:
   - Name Your Relationship - enter in the trading partner's name
   - Status - select your business relationship status with the trading partner
   - Type - select the type of trading partner

- Internal IDs - you can add customer-specific identifiers for this trading partner
- Comments - enter in a brief comment about the trading partner

3. Click **Relationship Tags**, and then select or add new keywords that describe your trading partner
   Note: This is a very sensitive step in this process depending on what Trading Partner Groups you have defined and what existing compliance requirements are set on those groups.
4. Click **Relationship Attributes**, and then select or add new keywords that describe your trading partner
   Note: This is a very sensitive step in this process depending on what Trading Partner Groups you have defined and what existing compliance requirements are set on those groups.
5. Click **Save**.
   You can also click **Cancel** to cancel your relationship connection with the trading partner.
6. After you have saved your relationship, you will note that the Connect button now shows Connected.



You have successfully searched for and created a Trading Partner Relationship with a trading partner that exists as a member in the Riskonnect ESG Network.

If you don't find the trading partner you are looking for, chances are they are not a member of the Riskonnect ESG Network. Please visit Adding New Members to the Riskonnect ESG Network for more information.

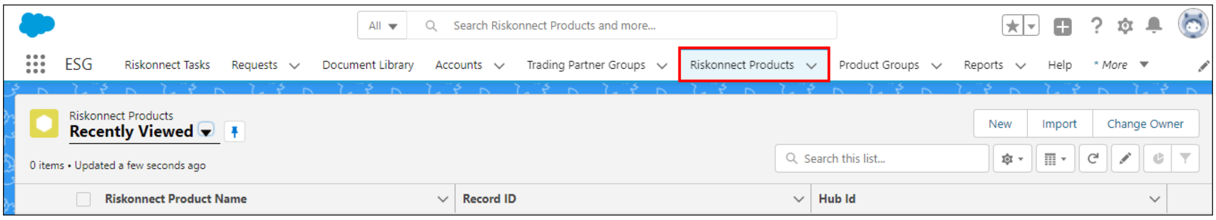
Adding New Riskonnect ESG Products

Last Modified on 06/03/2022 5:55 pm PDT

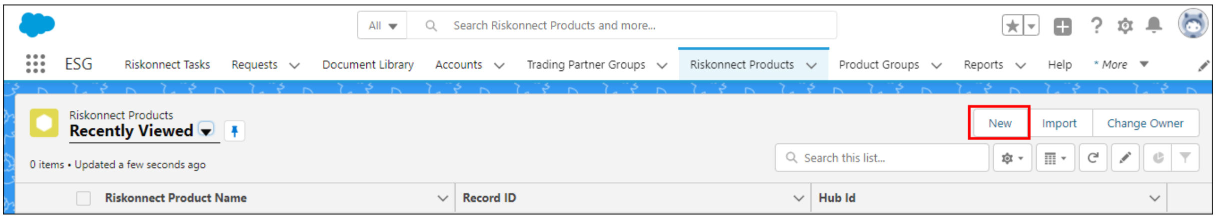
Adding new Riskonnect ESG Products into the network can be done using the Riskonnect Product Search page. We ask that you first search for the product to see if it exists, and if it does, you can connect to it; otherwise, you can create a new product.

To search for an ESG Product:

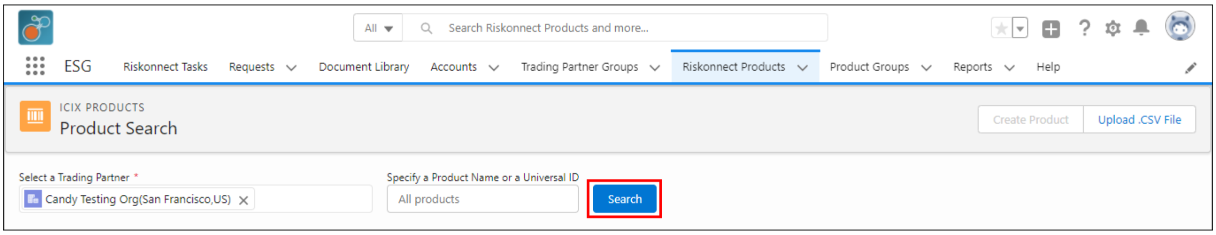
1. Log in to the Riskonnect ESG application and go to the Riskonnect Products tab.



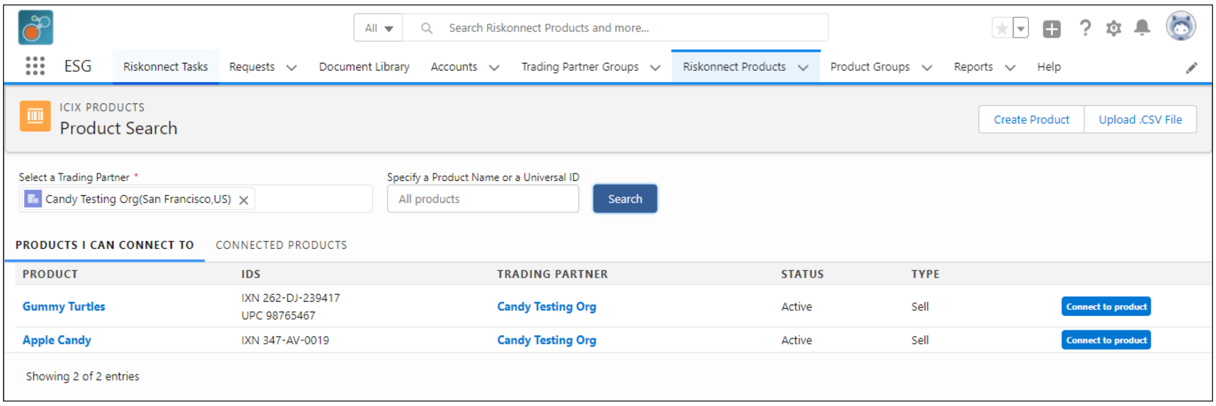
2. Click **New**.



3. Search for and select a trading partner that could be connected to the product in the ESG Network. You can leave the product description field blank for your search as this will show you all publicly exposed products that your selected trading partner has made available to connect to.
4. Click **Search**.



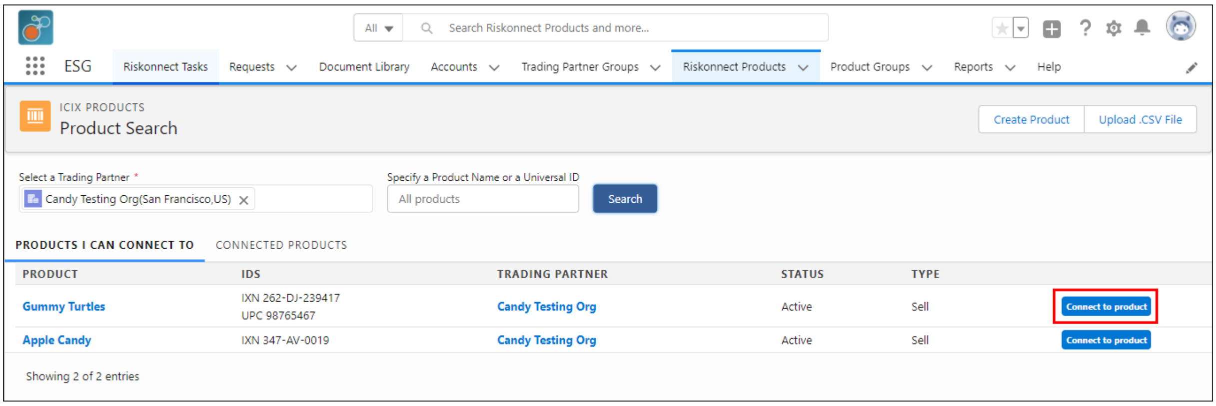
If there are matching results in the ESG Network, those results are displayed below the search criteria.



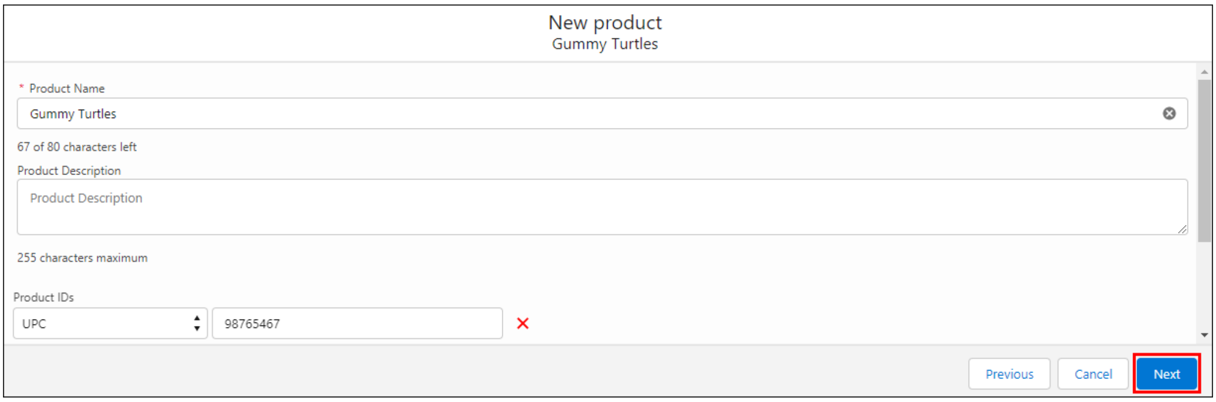
To connect with an existing ESG Product:

1. In the search results section, click **Connect to Product** for the product you want to connect with. You will be

asked to enter in your private ESG Product Relationship information.



2. On the Additional product information screen, you can enter in the following details:
    - Product Name - you can change the product name to something else. This information will only be updated in your view and not reflected in the entire network
    - IDs - you can add additional universally recognized identifiers to the product
    - Product Description - enter in a brief description about the product
    - Product Image - click on the icon or upload link to load an image of this product
3. Click **Next**.
   You can also click on **Cancel** if you do not wish to connect to this product.



4. On the Relationship Information screen, you can enter in the following details:
    - Relationship Status - select your business relationship status with the product
    - Relationship Type - select the type of product relationship
    - Internal IDs - you can add customer-specific identifiers for this product
    - Comments - enter in a brief comment about the product
5. Click **Relationship Tags**, and then select or add new keywords that describe your product
   Note: This is a very sensitive step in this process depending on what Riskonnect Product Groups you have defined and what existing compliance requirements are set on those groups.
6. Click **Relationship Attributes**, and then select or add new keywords that describe your product
   Note: This is a very sensitive step in this process depending on what Riskonnect Product Groups you have defined and what existing compliance requirements are set on those groups.
7. Click **Privacy Settings**, and then select from the following:
    1. Private - choose this setting if you don't want other trading partners to see you are connected to this product in the Riskonnect Network
    2. Public - choose this setting if you do want other trading partners to see you are connected to this product in the Riskonnect Network
    3. Viewable to Certain Trading Partners - you can select the trading partners you want to grant visibility to your connected product
8. Click **Save**.

You can also click **Cancel** to cancel your relationship connection with this product.

You have successfully searched for and created a Riskonnect ESG Product Relationship that exists in the ESG Network.

TRF - Test Class & Test Name Column

Last Modified on 06/03/2022 6:22 pm PDT

Moving forward with our ICIX Spring '20 Major Release, while you are viewing a Test Request Form (TRF) in Riskonnect, you will see one column for **test classes** and **test names**. Depending on a customer's implementation of their testing program in Riskonnect, these two records might be different. We used to display this data as two different columns when viewing the TRF.

In order to save screen real estate and to improve the overall loading performance of our TRFs, these two columns have been merged into one. You will see the test class above the test name in a single column. If you wish to not view the test classes in the same column, you can deselect the check box for **Test Class**.

Simple definitions:

Test Class - a test class is a higher level name given to a collection of tests that you are testing a product or component for. A test class can include 1 or more tests (test names) in the hierarchy of a testing program.

Test Name - the name of a test that is performed on a product or component

RK ESG 24.2 - August 6, 2024

Last Modified on 07/30/2024 12:41 pm PDT

Release Date: August 6, 2024

What's new?

Test Report and Certificate Search for Digital Experiences

Product Test customers have been asking for a way to share collected test reports from their verifiers, or testing labs, alongside generated certificates via Digital Experiences.

For some time, we have had a Search Certificates object and a Digital Experience component that allows community users, either private logins or public, to search for a product ID and the results return generated certificates. We now have a second component that exposes the Test Reports that are uploaded by a lab during the testing workflow.

This component requires configuration and business rules to be created uniquely per implementation.

Bug fixes

- Requests - Some requests were getting updated more than once during message processing. Issue resolved

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RK ESG 24.1 - February 7, 2024

Last Modified on 01/30/2024 11:15 am PST

Release Date: February 7, 2024

What's new?

- This release contains security-related fixes throughout the entire RK ESG application. We've made changes to our permission set layer to ensure that the application does not expose customer data to outside threats.

RK ESG 23.3.3 - November 21, 2023

Last Modified on 11/20/2023 9:28 am PST

Release Date: November 21, 2023

Bug fixes

- Trading Partner Groups - Roll back of optimizations we made to our TP Group request logic in RK ESG 23.3 on September 25, 2023. Requests are not being created properly for every group member when a tag/status/type is altered as a group member setting. Issue resolved.

RK ESG 23.3.2 - October 25, 2023

Last Modified on 10/23/2023 9:21 pm PDT

Release Date: October 25, 2023

Bug fixes

- Forms - Users are experiencing a loading issue when attempting to clone picklist questions with pre-populated answers in forms. Issue resolved.

RK ESG 23.3.1 - October 9, 2023

Last Modified on 10/02/2023 12:59 pm PDT

Release Date: October 9, 2023

Bug fixes

- Forms - Unrelated questions are intermittently being displayed in forms. Issue resolved

RK ESG 23.3 - September 25, 2023

Last Modified on 09/29/2023 4:10 pm PDT

Release Date: September 25, 2023

What's new?

Trading Partner Group and Product Group Performance Updates
We've made performance improvements to our grouping logic. For users who are using Trading Partner Groups and Product Groups for automating request creation based on requirements settings, you will now be able to create larger groups of members and the application will be able to handle changes to requirements much quicker since we no longer rely on older Salesforce-coding methods.

ESG Tasks - No More Approval Tasks and Email Notifications
When a request gets approved by a requestor, responders will no longer receive a new task email notification for a task that does not exist in the Open Tasks list view under Riskonnect Tasks.

Bug fixes

- Requests - In some cases, requests are not pulling the correct amount of products when the associated form is prepopulated. Issue Resolved.
- Certificates - Certificate of Compliance (COC) is not generated when there are incomplete Riskonnect Product Relationship details associated to a Riskonnect Product record. Issue resolved.

RK ESG 23.2.2 - July 31, 2023

Last Modified on 07/27/2023 9:28 am PDT

Release Date: July 31, 2023

What's New?

Product Test - Combined Certificate from Two Testing Programs - Product Component Exclusion
CPSIA Certificate will be generated if all of a product's components have passing test results tested in the MainTestingProgram OR in the RelatedTestingProgram; Combined Test Results should be in Certificate.

Product Test - Combined Certificate from Two Testing Programs - Extended Functionality to CPC Certificate Templates
We have extended the use case of generating a certificate with results from two testing programs to the CPC certificate template type.

RK ESG 23.2.1 - July 7, 2023

Last Modified on 06/30/2023 3:59 pm PDT

Release Date: July 7, 2023

General Fixes

- Product Test - Fixes an issue where duplicate certificates are being generated for passing test results which results in increased file storage.

RK ESG 23.2 - June 26, 2023

Last Modified on 09/29/2023 4:10 pm PDT

Release Date: June 26, 2023

Release Overview

Your browser does not support HTML5 video.

What's new?

Form-to-Object Mapping Engine

System admins can now relate form questions to other objects' fields and a backend process will copy answers and place them into fields on custom objects. Our customers have asked for the ability to view data collected via forms on specific records related to an account or related objects to an account to easily view data and take action.

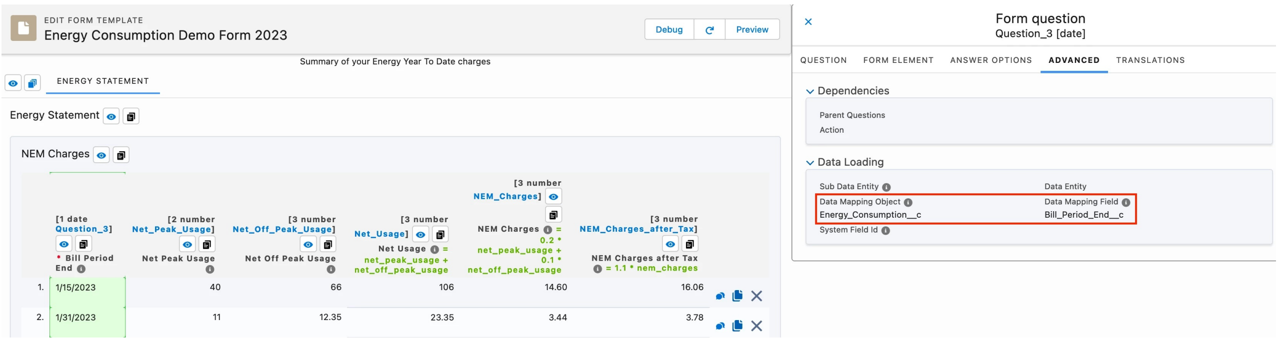
The list below maps out the capabilities in this release:

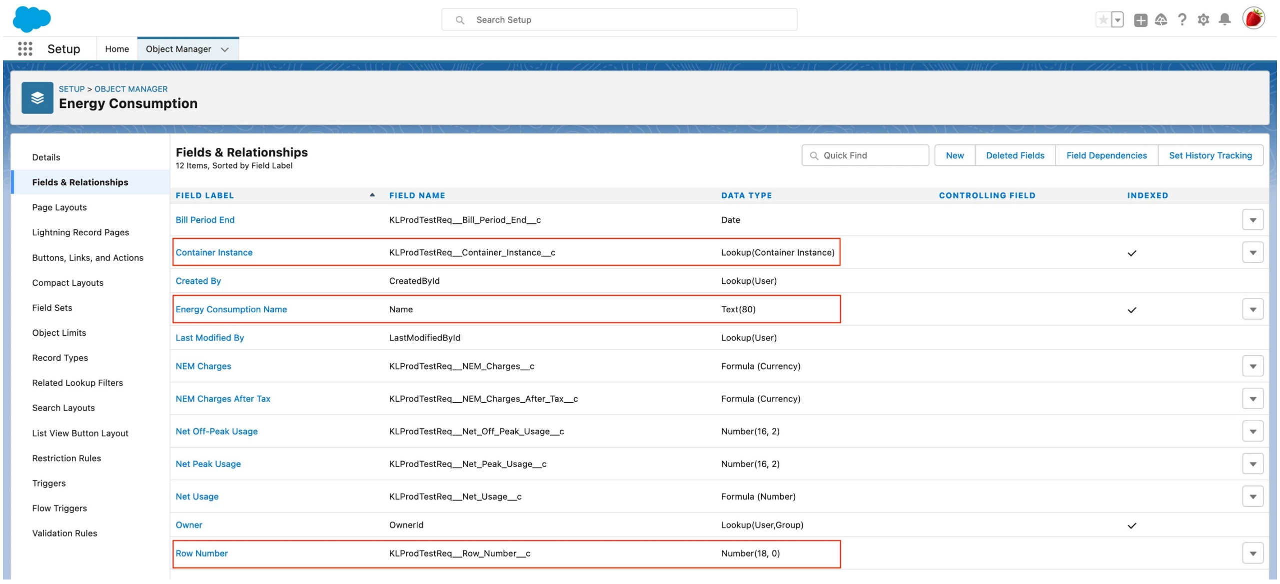
- System Admins can map a form question/answer to a field on either a standard or custom object
- System Admins can map a form question to multiple different fields, but cannot map the same object and field to different form questions
- Answers are only copied over when the associated Request = Closed and Workflow = Approved
  - If a form is reopened and approved again, we update the values on the existing mapped object record.

Technical details:

- Standard or custom objects used for this feature should have the following set of fields created by your System Administrator:
  - Container_Instance__c = containerInstanceId
    - All mapped objects should have a Container_Instance__c lookup field
  - Row_Number__c = rowNumber
    - Mapped objects for tables should have a Row_Number__c field
  - Recipient_Account__c = params.get('recipientAccountId') - formula field
  - Name = params.get('requestName') != null ? params.get('requestName') : params.get('containerName');
- Card Sections: creates 1 record corresponding to current form instance Container__c
- Table / Group sections: create 1 record per row with row number and form instance Container__c
- Default record name for text-based record types is the Request Name associated to the Container Instance. Default record name for auto-number is controlled by the auto-number configuration.

The example screenshots below are of an object that gets populated with multiple collected table row records. If you wanted to populate the recipient of the request to your object, make sure you have a Recipient_Account__c formula field created that includes the formula provided above.





Out of scope in this release:

- Admin cannot map multiple questions to the same field.
- Admin cannot map multiple table sections to the same field.
- Time field types are unsupported.

PT - Refactored PT Certificate Generation logic

The RK ESG package used to have one batch that generated all types of certificates for a product.

In production we can see that a product structure with many related products and many associated attributes can cause batch errors due to Salesforce limits: CPU timeout and Apex limits.

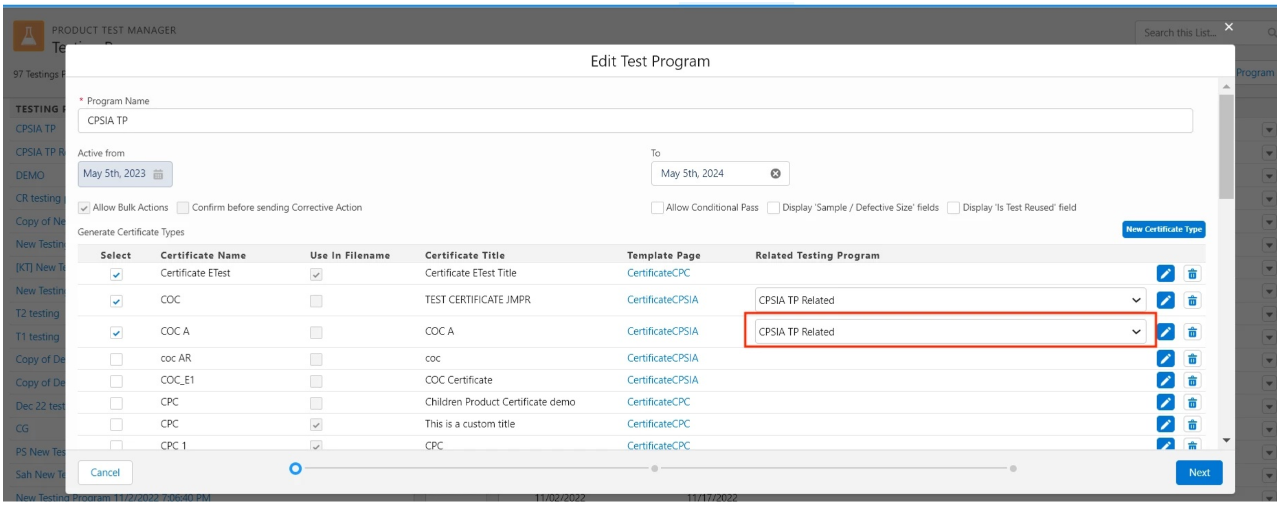
We have now broken down this master batch into one batch per certificate type. The certificate generation batches are now configurable by the parameters of Certificate (Id) and Testing Program (Id). There is also only one certificate type to Testing Program combination allowed per batch.

With this upgrade, customers will not notice any change to their experience and certificates will be generated as expected.

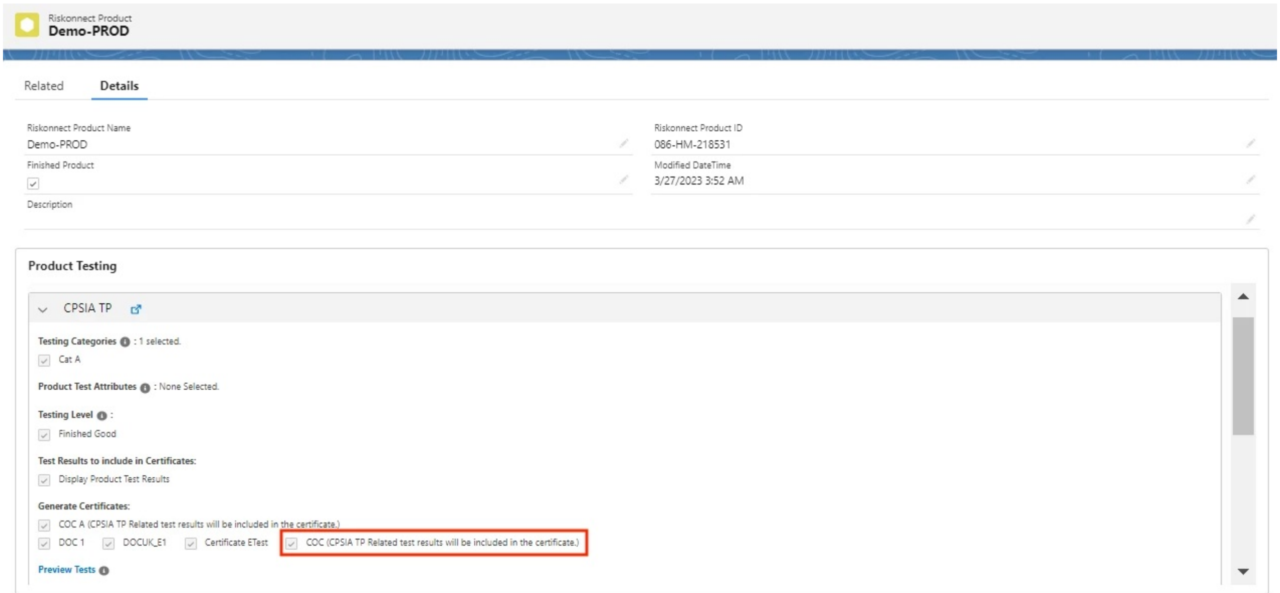
PT - Certificate Generation Logic from 2 Different Testing Programs

Customers have been reaching out for a way to generate a CPSIA certificate based on the testing results from multiple testing programs, and at the same time generating certificates for individual testing programs as well.

In this release, you can configure the certificate generation logic to generate a CPSIA certificate from two testing programs from the logic settings within the Product Test Manager.



When viewing a Riskonnect Product's Testing Program configuration, you wil see a note indicating that the certificate generation will pull test results from a related testing program.



Bug fixes

- Forms - Fixes and issue where the a date field in the calendar popover is showing the next day highlighted. Issue resolved.
- BRM - Fixes a issue where there could be duplicates of the standard lists in the List__c object. Issue resolved.

v4.57 Patch - April 3, 2023

Last Modified on 04/03/2023 8:41 am PDT

Release Date: April 3, 2023

General Fixes

- Forms - Fixes an issue where picklist values are not copied when cloning a form and where picklist options are not being created when migrating a form with picklist options. Issue resolved.

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v4.56 Patch - March 9, 2023

Last Modified on 03/09/2023 11:57 am PST

Release Date: March 9, 2023

General Fixes

- Tasks - Fixes an issue where user is presented with the error message "Aggregate query has too many rows for direct assignment" when approving a task. Issue resolved.

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v4.55 Patch - February 17, 2023

Last Modified on 02/16/2023 4:29 pm PST

Release Date: February 17, 2023

General Fixes

- Tasks - Fixes an issue where user is presented with the error message "Error approving request: List index out of bounds: 0" when approving a task. Issue resolved.

January 2023 Maintenance Release - February 13, 2023

Last Modified on 02/10/2023 10:48 am PST

Release Date: February 13, 2023

What's new?

PT - Testing Lab can be updated during 3-Actor PT Workflow

Testing Labs, or verifiers, can now reject a 3-Actor Product Test request back to a trading partner if there is a need to have the product tested by another lab.

When a testing lab rejects a form, we now let the responder choose a different testing lab in the TRF. After the change is made and the form is submitted, the new testing lab will receive the request and the requestor will be notified of the lab change.

Forms - Ability to define headers and footers in forms

Users can now add custom headers and footers to forms (Container Templates).

When accessing the Form Builder, users can define the header and footer details by using the Rich Text formatting section. There is no image support at this time, but users can provide HTML parameters to indicate how test should be displayed on the form.

Header and footer details will be included in downloadable PDF versions.

Forms - Updated packaged ESG forms

We've made some minor updates to the Social Baseline and Environmental Baseline forms to address some grammar and typo issues.

Bug fixes

- Forms - Fixes an issue where answer labels for default answer options on search and multi-search question types are not displaying.
- Forms - Fixes an issue where a user cannot clone forms with more than 5000 answer options.
- Forms - Fixes an intermittent issue for some forms where table data was misaligned and not loading properly for the end user.
- Tasks - Fixes an issue where the received date on the Riskonnect Tasks page does not match the Workflow Received Date.
- Tasks - Forms now display date and datetime answers based on adjusted UTC times.
- BRM/PRM - Fixes an issue where a requestor user can approve a form while bypassing required field validation in a form.
- BRM/PRM - Packaged email notifications now include the new Riskonnect Customer Support Portal link.
- PT - Fixes an issue where a testing lab is seeing duplicate request statuses when test requests are returned to verifier.

Patch - v4.46 - October 11, 2022

Last Modified on 10/10/2022 11:03 pm PDT

Release Date: October 11, 2022

General Fixes

- Forms - Fixes an issue where search and multi-search fields are not returning any results for open and closed requests.

Patch - v4.44 - October 3, 2022

Last Modified on 10/03/2022 12:22 pm PDT

Release Date: October 3, 2022

General Fixes

- Forms - Fixes an issue where answer labels for default answer options on search and mutlisearch question types are not displaying.
- Forms - Fixes and issue where the date and datetime values stored in forms are not showing in and accounting for locale settings in some orgs.
- Riskonnect Tasks - Fixes an issue where the displayed received date does not match the value stored on the associated workflow record.
- API - Fixes an issue where the RequestAPI is not allowing integration users to bulk create draft requests.
- Emails - Updated support URL to point to new Riskonnect Customer Service Portal instead of help.icix.com.

September 2022 Maintenance Release - September 19, 2022

Last Modified on 09/16/2022 10:00 am PDT

Release Date: September 19, 2022

General Updates:

- PRM - Updated functionality around Product Groups for request stability and updated how we manage group membership so that large numbers of products can be grouped together.
- Admin - Added internal APIs for requests to be reopened and added a packaged permission set for API Only users.
- ESG - Converted the last remaining internal object and field labels from ICIX to Riskonnect ESG.

Bug Fixes

- PT - Fixes an issue where the Approve and Retest CAR page was throwing an exception for too many records.
- PT - Fixes an issue where some of the form comments are hidden from view when they the form becomes too large.
- PT - Fixes an issue where no data is being added to the generated COC certificate when the "Customize" button is used.
- Forms - Fixes an issue where option lists used as picklist values is not showing the full list.
- Forms - Fixes and issue where picklist options are not loading with more than 1000 answer options.
- Requests - Fixes an issue where an exception is logged when auto-approvals are used for both 2-actor and 3-actor workflows.

Patch - v4.39.1 - August 11, 2022

Last Modified on 08/09/2022 10:28 am PDT

Release Date: August 11, 2022

Bug Fixes

- Fixes and issue where the date supplied in a date or datetime field in a form does not correctly match the value stored in the backend object.
- Request to Provide API details of ICIX Standard Request API to create bulk requests Admin users can now create requests in bulk by using the standard ESG Request API. See api.icix.com for more details on this API.
- Fixes and issue where form field dependencies (show/hide questions) is not working with parent picklist question values.

Patch - v4.39 - July 14, 2022

Last Modified on 07/08/2022 1:37 pm PDT

Release Date: July 14, 2022

Bug Fixes

- Fixes an issue where users have reported receiving past due notifications for requests that are in closed status.
- Fixes search question types in forms not loading the correct query data.
- Fixes users being able to see ESG Tasks when they are not configured to do so.

June 2022 Maintenance - v4.37 - June 20, 2022

Last Modified on 06/16/2022 2:21 pm PDT

Release Date: June 20, 2022

Release Overview

Your browser does not support HTML5 video.

What's New?

ICIX is now Riskonnect ESG!

Riskonnect ESG Application

- The ICIX Salesforce Lightning Application is now called Riskonnect ESG.

Email Templates

- All ICIX Task email templates have been updated with Riskonnect branding.

docs.icix.com

- The knowledge base for ICIX documentation has been updated with Riskonnect branding. All help articles have been updated to reflect the changes have that have been made to the Riskonnect ESG application.
- This release does not include a change of the domain name of .icix to .riskonnect at the moment.

api.icix.com

- Updated with Riskonnect branding and object label changes made to the Riskonnect ESG application.
- This release does not include a change of the domain name of .icix to .riskonnect at the moment.

help.icix.com

- When accessing help.icix.com, users will be redirected to the Riskonnect case management portal for logging help requests.

ESG Packaged Forms and Dashboards (GRI and Conflict Minerals)

This package contains a new set of best practice forms that can be generated from the Riskonnect Setup page within the Riskonnect ESG application. To deploy these forms to your org, go to Riskonnect Setup > Advanced Setup > Product Test Forms and choose the forms you want to deploy to your org. After deploying a form, it will appear in your Forms list and can be published to be used in a request. The request type is ESG and the form type is ESG.

ESG Forms

- Environmental Baseline

- Governance Baseline
- Social Baseline
- Conflict Minerals 2021 Survey

Riskonnect ESG Analytics (GRI and Conflict Minerals)

To complement the usage of our best practice ESG forms, you can also deploy the Riskonnect ESG Analytics package to your org as well and use our configured best practice dashboards for reporting.

- ESG Dataset and Dataflow
    - ICIX Core dataflow into Tableau CRM
- ESG Dashboards
    - Environmental Baseline
    - Governance Baseline
    - Social Baseline
    - Conflict Minerals 2021 Survey

Bug Fixes

- Various internal fixes have been included in this release.

Patch - v4.21 - May 3, 2022

Last Modified on 04/28/2022 12:50 pm PDT

Release Date: May 3, 2022

General Fixes

- ICIX Tasks - Users have reported an issue where the Reopen button on closed, auto-approved requests is not appearing on the corresponding ICIX Task. Issue resolved.
- ICIX Tasks - Users have reported an intermittent issue with cancelling requests using a global method when requests are in draft status. Issue resolved.

Patch - v4.18 - April 14, 2022

Last Modified on 04/14/2022 2:43 pm PDT

Release Date: March 31, 2022

General Fixes

- ICIX Tasks - Users are unable to take action on passing test requests. Issue resolved.

Patch - v4.15 - March 31, 2022

Last Modified on 04/12/2022 2:38 pm PDT

Release Date: March 31, 2022

General Fixes

- ICIX Tasks - Users are unable to recognize the correct received date within the ICIX Tasks page and user's custom list views. Issue resolved.

February 2022 Maintenance Release - February 21, 2022

Last Modified on 02/17/2022 10:01 am PST

Release Date: February 21, 2022

What's new?

Forms - Translations

For customers that wish to translate form names, tabs, sections, and question labels into other languages, admins can provide translations of the following languages: English, Spanish, Portuguese, French, Simplified Chinese, Traditional Chinese, and Japanese. The default language that all users will see when opening up a form is English.

To provide translations in the form builder, enter the Edit Question mode, and select the TRANSLATIONS tab in the panel. Select the language you want to provide a translation for. In Title, provide the translated label and then click Save.

Users will have the ability to select which language to translate the form into. If the admin does not provide any translations for at least one label, then that language selection will not show up in the Languages toggle button on the top right of the opened form.

The screenshot below demonstrates what a translated label might look like:

Requests - TPR Name instead of Account name when issuing requests

Admins can configure their org to use the Trading Partner Relationship (TPR) name instead of the account name when populating the generated request name using the Trading Partner check box on the request page.

To configure this setting, go to Salesforce Setup > Custom Settings > ICIX Settings > Manage. Set the Use Trading Partner Relationship Name to true.

ICIX Tasks - Filter based on Trading Partner Tags

We've added an additional filter on ICIX Tasks list views: Trading Partner Tags.

To filter an ICIX Tasks list view based on Trading Partner Tags, go to ICIX Tasks > Edit List View or New List View and select an available trading partner tag. If you are not using Trading Partner Tags in your org, then you will not be able to see any to select from.

ICIX Tasks - ICIX Tasks code has been refactored for optimal performance
We have optimized the loading time for ICIX Tasks. Instead of querying the Request, Workflow, Container, and Tasks objects, we are querying the Workflow object only to provide a faster overall user experience and to prevent unnecessary task records from being created in the backend which has caused data storage to be consumed and erroneous user setup issues.

Forms - Form Logos now supported
Customer can now apply their company logo in the top right corner of forms. This logo will be visible for all parties collaborating on the same form in a workflow.

To add a logo to a form, go to Edit Form > Edit Form Template > in the panel select a logo from the Logo list > Click Save. If you want to provide a new logo, please upload the file into the Salesforce Files object and expose it in the ICIX Public Library.

Forms - Section Sorting
Users can now sort rows in either tables or repeatable sections by clicking on column headers. By clicking on the column headers, users can sort rows of data either ascending or descending based on the values in their respective columns.

Forms - Section Filtering
Admins can now configure table and group sections to include section filtering. By configuring a question to be used as a section or table filter, users will see a panel above the section or table that indicates which field is filterable based on a value provided.

Forms - Color Highlighting based on values and formulas (2-actor WF only)

We now provide admins with the ability to color highlight a field based on either a selection in a picklist, a text string inputted into a text question, or based on a formula field's end result. Color Highlighting can be accessed in the Edit Question mode and by selecting the Advanced tab in the properties panel. See screenshots below:

Patch - v3.137 - November 18, 2021

Last Modified on 11/18/2021 2:08 pm PST

Release Date: November 18, 2021

General Fixes

- Forms - Fixes an issue where users are unable to upload files to an upload question in a form. Issue resolved.
- Forms - Fixes an issue where form answers are not copied properly when copying a container template. Issue resolved.

October 2021 Maintenance Release - October 25, 2021

Last Modified on 10/20/2021 7:31 pm PDT

Release Date: October 25, 2021

Bug Fixes

- Product Test - Fixes an issue where the lab account information in a Test Request Form doesn't display for responder or lab.
- Product Test - Fixes an issue where a user edits the Product Exception Rules in the TRF and the test results are not getting removed.
- Product Test - Fixes an issue for where duplicate requests were being sent out to trading partner when the PT multi-sourcing scenario is configured.
- Forms - Fixes an issue where comments in the form view are not getting fully deleted in the backend, causing the deleted comment to reappear upon reloading the form.
- Forms - Fixes an issue where field history tracking is not showing any highlighted changes after receiving the form back from a responder. Issue resolved.
- ICIX Tasks - Fixes an issue where some users were seeing a VisualForce page error when trying to access the ICIX Tasks page.

Patch - v3.124.1 - October 11, 2021

Last Modified on 10/12/2021 10:32 pm PDT

Release Date: October 11, 2021

General Fixes

- Requests - Fixes an issue where if a user clicks on a request or workflow record, they are prompted with a page loading error. Issue resolved.

August 2021 Maintenance Release - August 19, 2021

Last Modified on 08/19/2021 4:33 pm PDT

Release Date: August 19, 2021

Bug Fixes

- BRM - Document uploads do not work when user's language is set to Chinese. Issue resolved.
- Forms - New form editor does not show checkbox "Auto-Approve 2-Actor Requests" enabled after saving changes. Issue resolved.
- Product Test - In some cases, the resubmit button is missing on two-actor product testing workflows. Issue resolved.
- Product Test - Intermittently, an admin user is not able to add more than 20 preferred labs to a testing program. The issue where trading partners could only see a small subset of possible testing labs to choose from has been resolved.
- Product Test - No new tasks are created when re-opening a request when auto-approvals are configured. Issue resolved.

June 2021 Maintenance Release - June 27, 2021

Last Modified on 06/21/2021 8:33 am PDT

Release Date: June 27, 2021

What's New?

Form Builder 2.0
We now have a new version of the ICIX Form Builder that enables admins to create forms using a much more intuitive tool. If you are an admin creating forms on behalf of your customers, please reach out to your ICIX contact for more details and for training documentation.

Admin - Process Job Schedule: Ability to Slow Down Processing

ICIX System Admins now have the ability to schedule batch jobs to run at a slower frequency. For example, jobs can be scheduled during certain times on certain days of the weekend, or they can reduced and stopped after office hours.

To make this change in your org, navigate to the Process Job object and on the record, there are some fields that you can edit to slow down processing:

Weekend Slowdown:

- Multi-picklist "Do not run on selected days" - Select to not run Jobs on selected days: Mon, Tue, Wed, Thu, Fri, Sat, Sun
- Number field “Interval during Weekend”
- “Frequency during Weekends”

After Office Hours Slowdown:

- Define Office Hours:
  - After Office Hrs Start
  - After Office Hrs End
- “Interval during After Office Hours”
- "Frequency during After Office Hrs"
- "Do not run during After Office Hours" - Select to not run Jobs during After Office Hr

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Admin - Deprecated Primary UBE ID on User Record
The ICIX ID field on user records is no longer tied to any piece of ICIX Core code. For system admins, you do not need to apply an ICIX ID for your users in order for ICIX to operate.

Forms - Reusing Document Library Fields for Upload Questions

System Admins can now configure upload fields to prompt users to either upload a new file or upload an existing file from their document library when filing out a form. This feature is configurable per question.

API - Product API Supports Custom Fields

The ICIX Product API now supports custom fields in the product hierarchy. For example, users can add a custom field to the ICIX Product object and populate that field with data passed through the API. For more information, please visit api.icix.com for documentation on the new changes.

Global - ICIX Pages Translated in Portuguese

The ICIX Tasks, Document Library, and Request pages now support language translation in Portuguese.

Forms - Multiple File Uploads in Table and Group Sections

Table and Group Sections in forms can now support the ability for users to upload more than one file per question field.

Bug Fixes

- Product Test - User is able to submit TRF without picking a lab. Issue resolved.
- Product Test - DoC printout margin causing print text not shown in the right-hand margin. Issue resolved.
- Product Test - Blank Product Test Attributes are created during import. Issue resolved.
- Product Test - User is not able to send Request from Product when you upload a document in a Test Request Form. Issue resolved.
- Product Test - Users not able to create a New Testing Program when there's lot of user accounts - *Testing Program* notification types in org. Issue resolved.
- Forms - Users not able to import forms using ICIX migration tool. Issue resolved.
- Forms - Dependent values are not visible when we toggle YES/NO on parent picklist question. Issue resolved.

Patch - v3.108 - May 9, 2021

Last Modified on 05/06/2021 11:10 am PDT

Release Date: May 9, 2021

General Fixes

- Form Migration Tool - Fixes an issue where forms cannot be migrated from one environment to another.

May 2021 Maintenance Release (v3.107) - May 2, 2021

Last Modified on 04/22/2021 10:27 am PDT

Release Date: May 2, 2021

What's New?

Requests - Reopening Closed Requests

Previously, we only allowed reopening of requests for 3-actor PT workflows. With this release, users can reopen any type of 2-actor and 3-actor workflow in order to make a workflow modification.

- Only users with the ICIX Admin User and ICIX Power User can reopen a request.
- These users will see the Re-Open button on the ICIX Task List and Task View Page located on the request page layout (if configured).
    - The Button should be Visible on the Task View Page section on Request Details Page Layout under valid circumstances .
- Only requests that have been set to the following can be reopened:
    - Request Status = Closed
    - Workflow Status = Approved, Pass, or Fail
- Cancelled requests cannot be reopened
    - If a test request has a corrective action related to it, the corrective action and its parent TRF cannot be reopened.
    - Corrective Actions cannot be reopened
        - Once we have corrective actions sent out, the parent TRF cannot be reopened.
        - If no corrective actions are sent out, user can reopen the closed request.
- There is a "Reopened" check box on workflow object to indicate a workflow has been re-opened by an ICIX Admin User or ICIX Power User.
    - The check box gets set to true when the Request is reopened. If the request comes back and approved, the check box will be set to True.
    - Nice-to-have: keep track of how many times it was reopened - new field? (last modified)
    - Reopen button will not be visible if the request reached the max number of rejections.

PT - Published Forms for Retest Logic

We have put some restrictions in place for product test retests that prevent "bad" request from happening.

- After a corrective action is approved, user can select Accept and Retest or Accept Failed Responses.
- When the user clicks on Accept and Retest:
    - If there is an active published form, this form will be sent.
    - The previously published, but now unpublished form will not be sent out. If this is the current setting, the user will be prompted with the error message, "Please contact ICIX Support - No Active TRF found."
    - If there are multiple versions of the same product test request form, the latest published version of the TRF related to the testing program will be sent out in the retest.

PRM - Upload ICIX Products, Related Products, and Purchase Orders by .CSV Files
Users can now upload a .csv file to create ICIX Product, Related Product, and Purchase Order records right from within the ICIX application.

By going to ICIX Products > New, there is now a button that says, "Upload .CSV File". When you click on this button you will be prompted to upload a .csv file containing the data related to object records you wish to create.

BRM/PRM - Updated Relationship and Group Pages for a Better User Experience
We have optimized the user experience of our create and edit relationships pages. None of the existing content has changed, but the overall look and feel has been updated to be more responsive and easier to use.

- Trading Partner and Product Group Edit Pages
    - Replaced existing tabs interface with a single screen where Status, Type, Tags, and Attributes can be seen in a single view.
    - Optimized code for calculating members and comparing which should be added / removed
- Relationship Attributes, used in Partner Groups, Product Groups, and Product Relationship pages:
    - Now a simple table with the attribute selection in first column, and its value in the 2nd column (can be entered as text , picklist or multi-picklist)

PT - Certificates Without Tests Will Not Get Generated

We now restrict blank certificate generation if no protocols are tested for a product.

Previously all cert gets generated when:

- A testing program is set to have multiple certificate templates and all the template are assigned under the testing program product object.

A product could be tested for different protocols and the certificate batch will now only pick the template where protocols are tested in the latest TRF or custom parameter “UPR ID + Request ID”.

API - Set Product Test Method Now Supports Product Test Attributes Assignment

Setting product test in the ICIX Product API v4.0 and v5.0 now enables users to allow user to specify Product Test

Attributes. These parameters will create Testing Program Product Attribute.

Bug Fixes

- PO API v5.0 null exception when quantity is a blank string. Issue resolved.
- Lab address is missing when multi-picklist is used as lab selection. Issue resolved.
- Testing Lab Account records does not get created with PT request reaches responder org. Issue resolved.
- No request is sent when QE User uploaded an attachment in TRF. Issue resolved.

Patch - v3.104 - March 10, 2021

Last Modified on 03/10/2021 3:37 pm PST

Release Date: March 10, 2021

Bug Fixes

- Add Group Section is throwing "Un Responsive" popup and providing user to either "Wait" Or End Page - Performance Issue
- ICIX Forms : On Group Section Dependency Visibility Functionality is not working
- Forms: Group Sections validation and comments per section row
- Fix Empty Product Id Issue - Messaging Update
- Fix Empty Product Id Issue - API Product Creation

February 2021 Maintenance Release (v3.102) - February 21, 2021

Last Modified on 02/19/2021 11:40 am PST

Release Date: February 21, 2021

What's New?

Forms - Additional Fields for Tables, Sections, and Reusable Data

- Disable Get Data - Admins now have the ability to disable the Get Data functionality for users accessing forms. When this feature is enabled in the container template within the form builder, users will not be able to pull in data from other forms they have previously filled out.
- Disable Adding/Removing Table and Section Rows - Admins now have the ability to prevent users from adding rows in Tables and Group Sections.
- Disable Copying of Table and Section Rows - Admins now have the ability to prevent users from copying rows in Table and in Group Sections.

PT - Configurable Remove Test Button (Trash Can)

With this new form builder setting on a TRF, admins can restrict the removal of tests added to a TRF from other users.

As an admin in the Restrict Test Deletion section in the form builder, you will see instructions that will help you define which actor in the workflow can remove ANY test from the form, which is the default when set to "undefined", and also which actor can remove tests that they add and may want to remove if there is a mistake and the form has not been submitted yet.

Requests - UX Changes

There are some minor user experience changes to the new request page.

If you are creating a new request from the Request object, you will still see the option to append the partner and product name to the request name.

If you are creating a new request from the Account > Requests > New related list OR Account Trading Partner Relationship > Requests > New related list, the partner name will be automatically selected and added to the start of the request name. You cannot choose another partner or partner to append as both check boxes are hidden.

If you are creating a new request from the ICIX Product > Requests > New related list OR ICIX Product Relationship > Requests > New related list, the product name will be automatically selected and added to the start of the request name. You cannot choose another product to be added to the request. Since the product can be associated to several other trading partners, you can choose to append the partner name to the request name as multiple request for one single product might be sent out.

API - Request Creation Owner

We have updated the RequestAPI that supports Owner as a parameter. When this is set, the owner of the request is populated with the User ID that is passed while creating a request. When no User ID is passed as the owner, the owner is the user who initiated the request (this is the existing behavior).

Request owners do not get synchronized across orgs - they never have.

API - Message Object for APIs

For API messages, we have created a separate object to store this data, and structured similarly to the existing messages object.

All versions of our API now use this new object: API_Message__c.

PT - Custom Certificate Name Per Certificate Template

For certificate templates, you can now give them a specific name.

- There is a field in the UI that allows you to add a custom certificate per certificate template. This helps with distinguishing the difference with the same template used more than once when a passing result triggers a certificate to be generated.

Bug Fixes

- Forms - Fixes an intermittent issue where a a user who is adding a new test to a TRF is expecting to see the associated test methods visible but they are not loading properly. Issue resolved.
- Forms - Fixes an intermittent issue where trading partners are unable to select an approved lab to forward a product test request to. Issue resolved.
- Audit - Fixes and intermittent issue when some larger audit forms are generated into a PDF file and the fields are duplicated. Issue resolved.

Patch - v3.93 - October 29, 2020

Last Modified on 10/29/2020 3:53 pm PDT

Release Date: October 29, 2020

General Fixes

- Fixed an intermittent issue with reprocessing requests in the network.
- Fixed an intermittent issue where product test requests do not get submitted properly.
- Corrected some minor core permission set configurations.

October 2020 Maintenance Release - October 19, 2020

Last Modified on 10/16/2020 11:01 am PDT

Release Date: October 19, 2020

PT - Allow multiple images in a DOC document (CR-1531)
Verifiers can now upload a maximum of 15 images to an upload field in a TRF and we will include all of those images in the generated certificate for a passing test request. Images are shown in the order they are uploaded in the TRF.

PT - Display preview of uploaded files on Form (CR-1560)
Users who are viewing a form and uploading files to upload questions can now optionally view a preview of the files they have uploaded. By selecting the *Preview* check box, you will see a small preview of each uploaded image.

This feature works for both standalone upload questions and also in tables that have an upload question as a column.

Bug Fixes

- PT - Fixes an issue where CPC certificates were not showing retailer section by default
- PT - Fixes an issue where images in the DOC for UK were not all appearing correctly
- PT - Fixes an issue where the DOC for UK was not showing the correct header and footer details

Patch - v3.80 - September 9, 2020

Last Modified on 09/10/2020 10:55 am PDT

Release Date: September 9, 2020

General Fixes

- Fixes a global issue where forms were not viewable for some users

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September 2020 Maintenance - September 8, 2020

Last Modified on 08/28/2020 1:15 pm PDT

Release Date: September 8, 2020

What's New?

PT - UK DOC Title and Product Image

The UK DOC now shows the correct title and product image when generated from a TRF.

PT - Request Cancellation and Comments from ICIX Tasks Page

For only 3-actor Product Test request does ICIX allow you to cancel the request from the ICIX Tasks page. When you have received a response back from your trading partner you will see an ICIX Task with a Cancel button in the task action bar. By clicking on Cancel you will be directed to a request cancellation screen where you can provide a comment for the cancellation. After you confirm the cancellation, the request will be closed and your comment will be added to the record and your trading partner will be updated with a cancellation task.

PT - Test Methods in Printable PDFs

With this release, you are now able to include test methods for each test item in the printable PDF.

By selecting "Show Test Method" above the test results table, you will notice the test methods (if configured) appear alongside the test items in the table. When you choose to save the TRF as a PDF, the test methods will be included that generated PDF. This is in addition to the test classes and test categories.

PT - Default view of Test Results Panel (CR-1458)

In this release, admins can configure what data sets to include in the test results panel. As an admin, per form, you can choose to show/hide Test Categories, Test Classes, and Comments by default when your users are sending out test requests.

BRM - Create Requests from Accounts and Trading Partner Relationships

Related to the Accounts object and Trading Partner Relationships objects is the Requests related list. By going to either location of the Requests related list, you can click on "New" and the request creation page will appear with that trading partner pre-filled for you in as the main recipient.

Bug Fixes

- PT - Fixes an issue where admin users are unable to add a "Note" to a test item in the Product Test Manager. Issue resolved.
- PT - UK DOC - Fixes an issue where the proper title and product image are not being included the certificate generation logic. Issue resolved.
- PT - Certificates - Fixes an issue where certificates are not generating if there is a long summary of failures. Issue resolved.
- API - Fixes an issue where the description of the call is being updated when not referenced in the payload. Issue resolved.

Patch - v3.76 - August 21, 2020

Last Modified on 08/21/2020 11:08 am PDT

Release Date: August 21, 2020

General Fixes

- Fixes a global issue where some requests are not being processed properly.

July 2020 Maintenance Release - Jul 7, 2020

Last Modified on 06/30/2020 2:43 pm PDT

Release Date: Jul 7, 2020

General Fixes

- Product Test - New DOC for UK-Imported Products
- Network - Stop Sending TP invitations on TP Sync - We have changed our connection logic, where we are no longer sending out trading partner invitation requests when we are performing regular backend maintenance.

Bug Fixes

- Product Test - EU DOC was showing an incorrect mandatory text in Section 5 of the generated certificate
- Product Test - Fixed an issue where some testing lab options are not available for selection to the responder
- BRM - Fixed a problem in the document library where the shared field showed an incorrect list when document is at the beginning of document list

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Patch - v3.64.1 - June 14, 2020

Last Modified on 06/11/2020 11:26 pm PDT

Release Date: June 14, 2020

General Fixes

- Product Test - Fixes a problem where generated DOCs are missing clauses

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May 2020 Maintenance Release - May 26, 2020

Last Modified on 06/01/2020 2:09 pm PDT

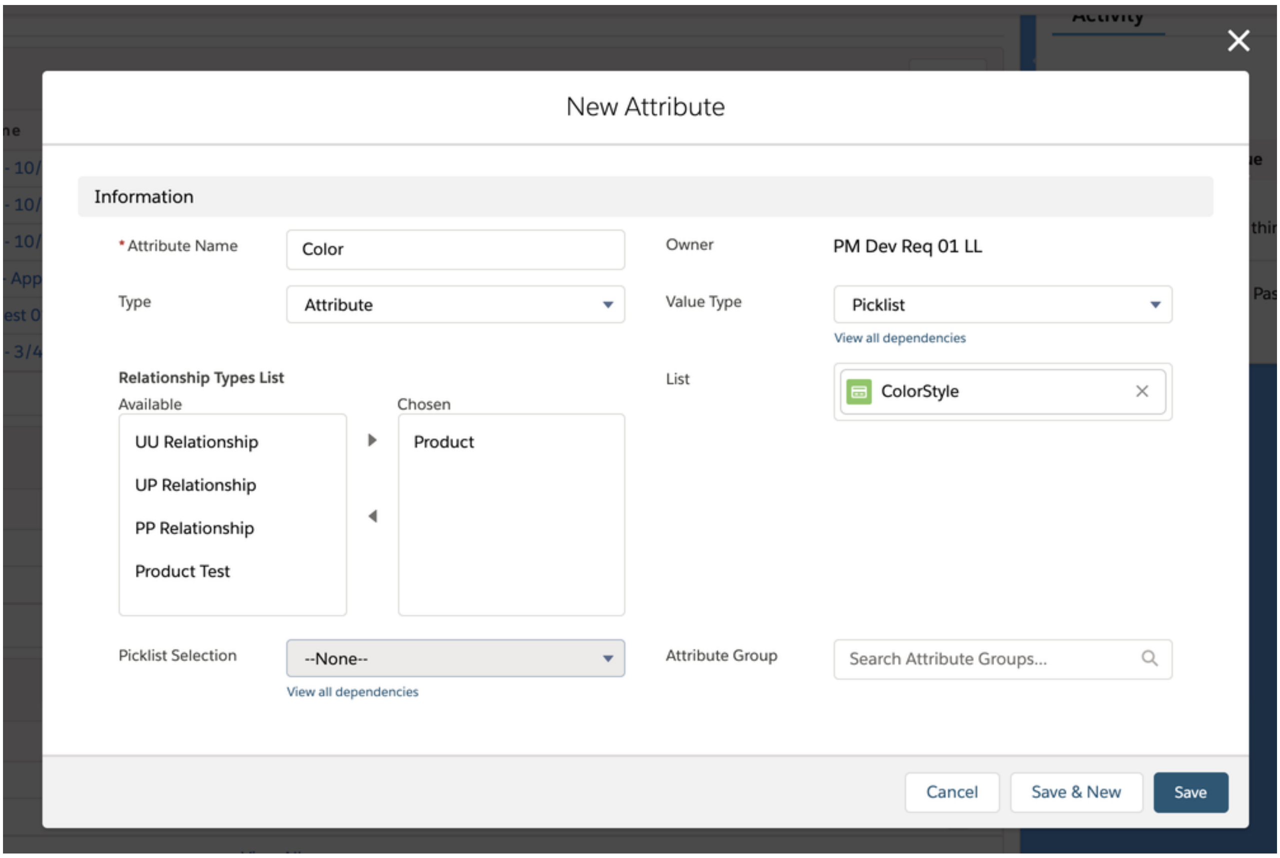
Release Date: May 26, 2020

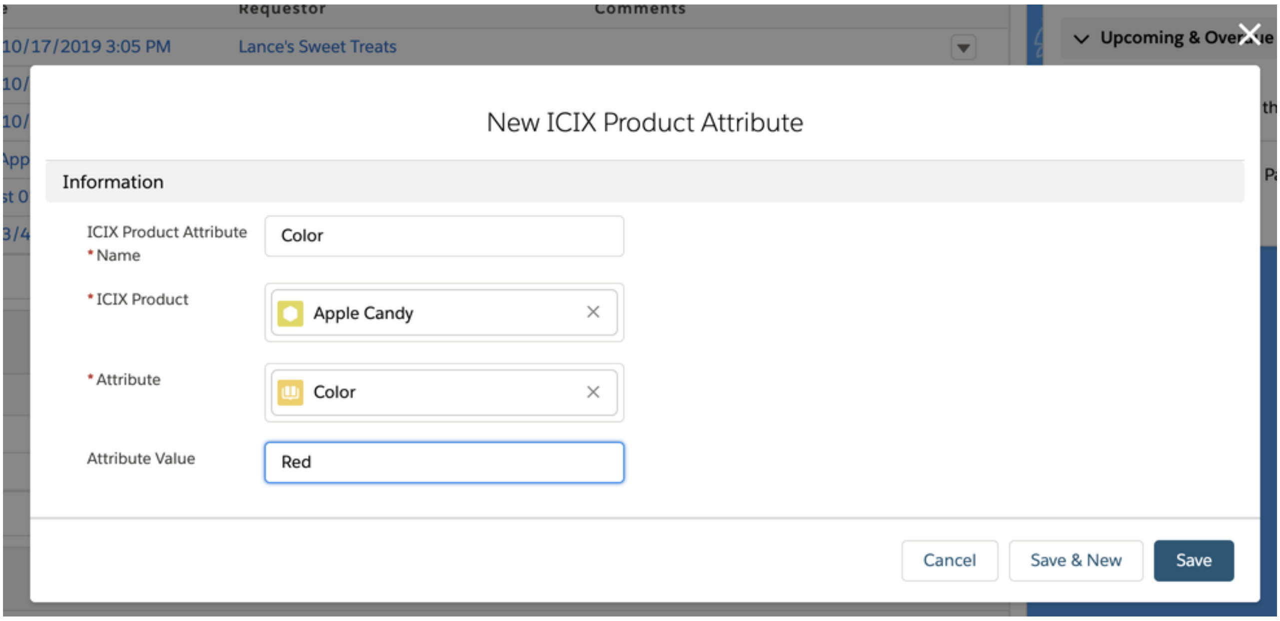
What's New?

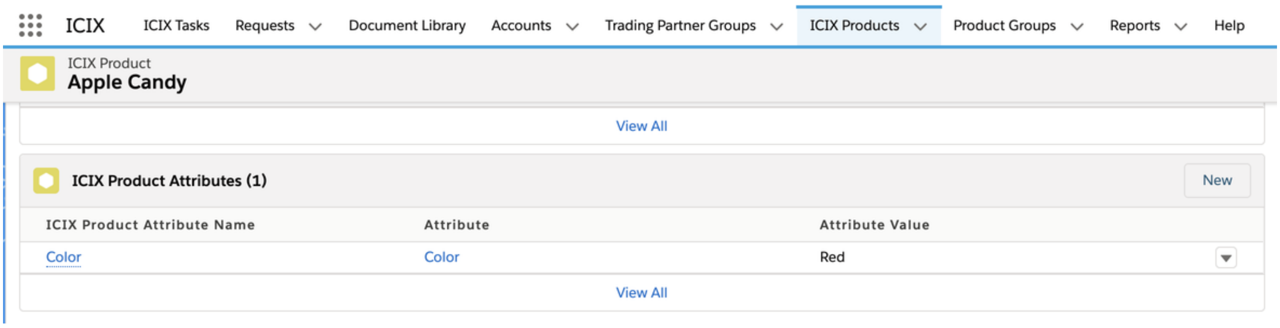
PRM - ICIX Product Attributes (New!)

As a trading partner, you can now assign attributes to the ICIX Product level so that you can essentially describe the product with related data similar to how you define relationship attributes.

- New junction object called "Product Attributes" which is related to ICIX_Product_c and Attribute_c.
- Using the Attribute_c object to look up to Product_Attribute_c
- This object includes the following fields:
  - Product Attribute Name - text field
  - ICIX Product - lookup
  - Attribute - lookup
  - Attribute value - text
- Added attribute type to Attribute_c.Relationship_Types_List__c called "Product" Attribute.



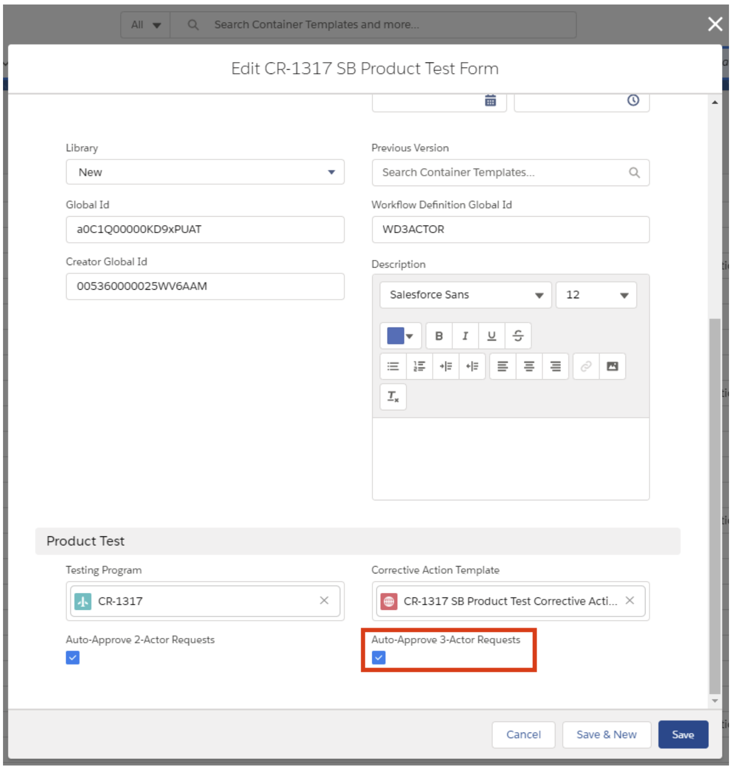




Product Test - Automatically Approve Passing Test Results for 3-Actor Workflows

As a trading partner requestor, you can now have your test requests automatically approved without manual interaction when the test results are passing.

- This is a similar feature like we have for 2AW for auto approving requests
- This configuration setting for 3 actor wf product test is on the container template
- When the lab submits results to the requestor and all of the results are **passing**, this flag picks up and automatically marks the request as Closed and the workflow as Pass.
  - For failures, nothing different will happen: users will get a task as usual and will take action manually.
- No ICIX Tasks are created for any user when:
  - All test are passing in the test request
  - All Tests are Information Only / Exempt
  - Flag is set to auto-approve test requests per container template
- To enable the feature, a new check box field is available for system administrators to add to the page layout, and then set as true: **Auto-Approve 3-Actor Requests.**



PT - All Tests Marked as Information Only

We have updated the scenario when all of the tests in a test request are marked as Information Only. The following describes what happens when the use case occurs:

- Workflow Status will be set to **PASS**
    - When the requestor APPROVES the PASS for all info only tests, the workflow gets updated to Pass, and the Request is Closed.
- RegulatoryLimitSummary and BrandLimitSummary = **INFO ONLY**
- Certificates (CPC, CPSIA, COC) all get generated as normally configured for passing test results.
    - Tests are set to be included in certificates through the PTM > Testing Categories
    - By default, no tests are shown in the certificates because they are not set in the PTM > Testing Categories

Side note: If all tests are marked as Warning and they are all passing, the Workflow Status will be set to**PASS.**

Bug Fixes

- ICIX Tasks - A task group does not show the requests if we directly search with task group name
- PRM - User is getting stuck on Add New Related Product screen if save button is clicked with blank data
- PT - Test Forms - PDF - A block of comments in a single test introduces a page jump in the generated PDF
- PT - Product Test Headers are showing in the middle of the page and not on the top
- PT - TRF convert to PDF failing in some cases
- PT - Forms to PDF : Test Results tab not included in PDF when longer than 4MB

- API - Product API - Duplicate External ID issue

Patch - v3.62 - April 13, 2020

Last Modified on 04/15/2020 10:13 am PDT

Release Date: April 13, 2020

General Fixes

- API v5.0 - Fixes an issue where AddProducts service gives false positive for duplicate relationship
- PRM - Fixes a problem where users might have issues when relating products to one another from the UI
- Product Test - Fixes an issue where field-level comment bubbles disappear on test reports submitted by verifiers to requestors

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Patch - v3.59 - April 9, 2020

Last Modified on 04/15/2020 10:14 am PDT

Release Date: April 9, 2020

General Fixes

- API v5 - UPR fields in Relate Products service should be optional

April Maintenance Release - April 6, 2020

Last Modified on 03/27/2020 9:06 am PDT

Release Date: April 6, 2020

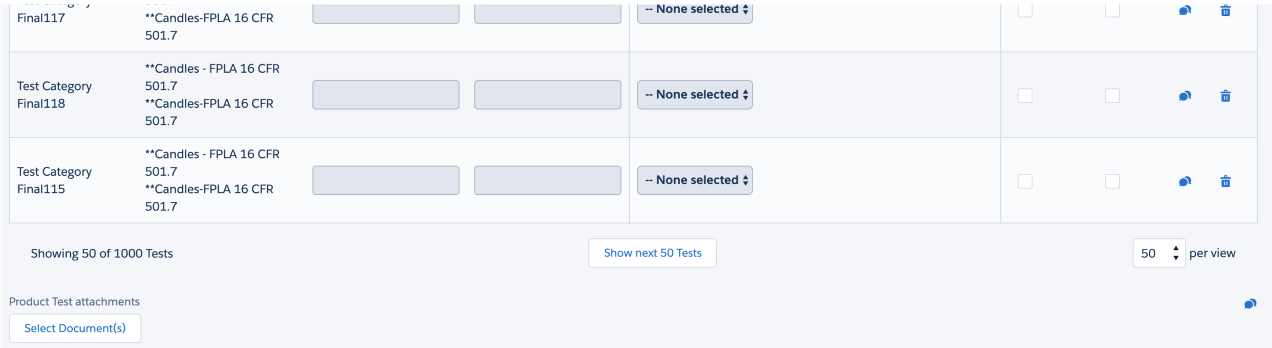
What's New?

PT - Test Loading Updates in Test Requests

We have changed the default number of visible tests to 200. Any test request with more than 200 tests will be shown in increments of 50 tests. You can click on the "Show next 50 tests" to see the next set of tests. This is to provide faster loading times of a TRF that contains a large dataset.

TRF screenshot with less than 200 tests:

TRF screenshot with 200 or more tests:

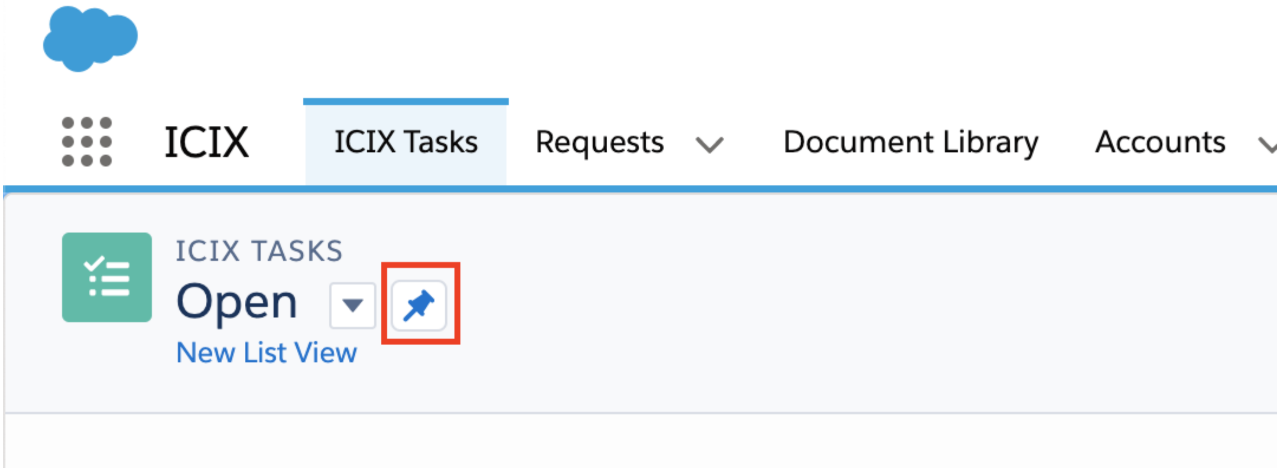


Tasks - Pinned Lists!

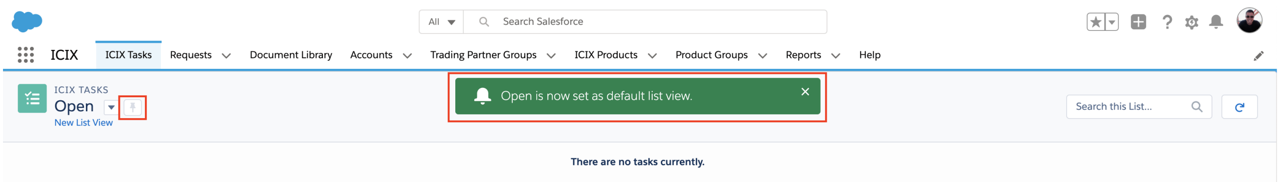
To be more consistent with Salesforce's user experience, we have adopted "pinned lists". After you navigate to the ICIX Tasks page, you will see a little pin button next to the list view.

By clicking on this pin, you will be setting that currently viewed list view as your default list view. Every time you navigate to the ICIX Tasks page after pinning a list view, the default will appear.

Pinned list indicator:



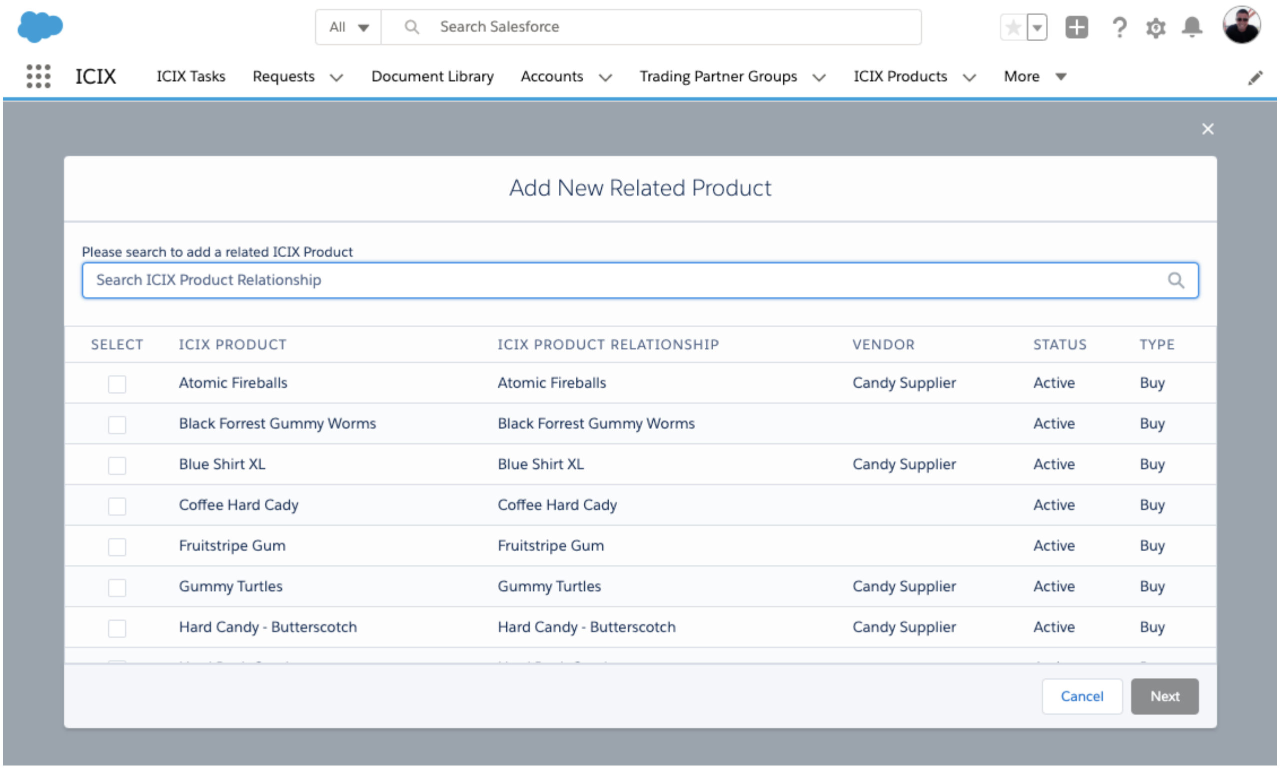
Pinned list (set default) confirmation:



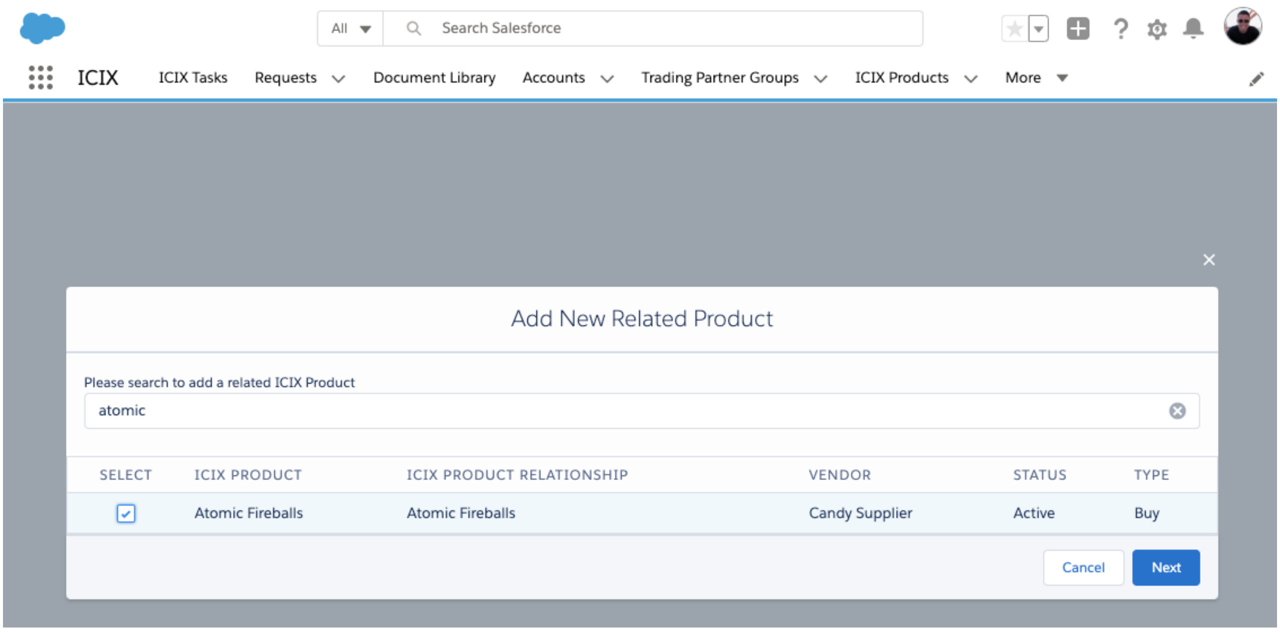
PRM - New Related Product Page for searching and connecting to child products
Over the past few years, we have been utilizing the standard Salesforce UI for creating child records for Related Products. This is how we used to relate one product to another to create a product-to-product relationship.

In this release, you will be prompted with a new UI for searching for and connecting to products so that you can establish your related product relationships.

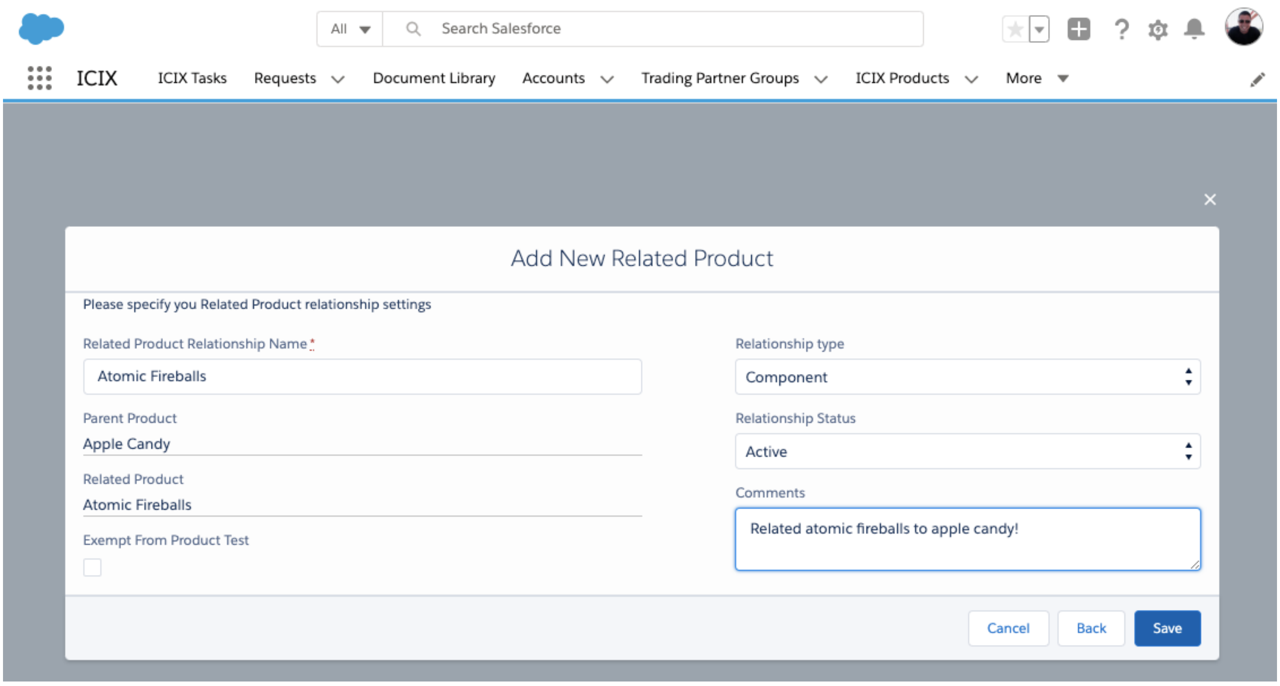
When you navigate to the ICIX Products > Related Products related list, you can click on the "New" button to create your new relationship:



After you search for a product, select the check box next to that record and then click "Next":



On this following screen, enter in your related product relationship criteria, and then click "Save":



PT - Update When All Tests are Marked as Exempt

For test requests that get submitted by a verifier that have all tests marked as "Exempt", the Workflow Status will be set to "Pass" and the Regulatory Limit and Brand Limit Summaries will both indicate a "Pass" within the TRF.

As a requestor of the test request, you can now approve these test requests and a certificate will be generated that includes the complete list of exempted tests.

Bug Fixes

- PT - Test Result history should not be shown when only 1 version of the result exists
- PT - User cannot mark a Fail test result as Conditional Pass
- PT - TRF convert to PDF failed
- PT - Sorting of Test Class & Test Name is not in order on TRF test result section
- PT - Printing of TRF with (revised) comment layout is not looking good
- PT - Failed Test Exempted by Lab showing as FAIL in TRF and PASS in Request.
- BRM - TP Groups - Error when adding TPs to Group
- BRM - Application ask for Expiry Date although in Form this field is set to Do not require Expiry date.
- BRM - Partner ICIX ID not populating in ICIX Documents for a shared document
- PRM - Search results shows less than 25 records per page when using both filters to search
- PRM - Product Groups - Error when adding bulk products in Product Group
- API - v5.0: Add testing programs > No error validation for invalid "Unit" and "Limit"
- API - v5 AddProducts - Multiple products can be added with same Universal IDs
- API - v5 AddTestingPrograms - PT Attributes are not adding through API

Spring '20 Major Release - v3.52 - February 24, 2020

Last Modified on 01/19/2021 9:00 pm PST

Release Date: February 24, 2020

Release Overview

Your browser does not support HTML5 video.

What's New?

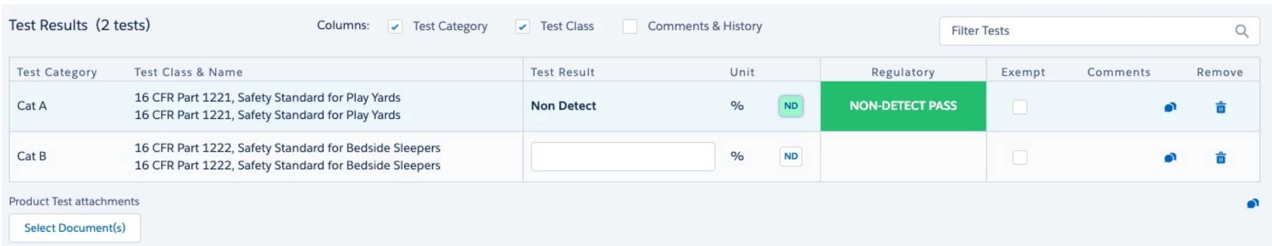
PRM - New Product Universal ID Type: JAN

To accommodate our customers who are communicating with trading partners in relation to products using the Japanese Article Number (JAN), we have added this value into the ICIX Product Universal ID Type field. This field can be used along with UPC, EAN, ISBN, and GTIN product identifiers.

TRF - Test Pagination

When Test Request Forms (TRF) contain more than 50 tests, the performance and usability when providing test results can be degrading. We are introducing test pagination, where we will show up to 50 test per page (by default). If the total number of tests is greater than 50, those tests will fall onto a new page, which can be accessed via the page selector widget.

- Users can use pagination (bottom of the test results table) of test results to load additional testing items
- If test count is greater than 50, there is a page changer that enables you to load additional testing items
- Test View Filters - users can filter out tests based on test result such as *Pass*, *Fail*, *Information Only*, etc.



PTM - Units for Product Test Limits

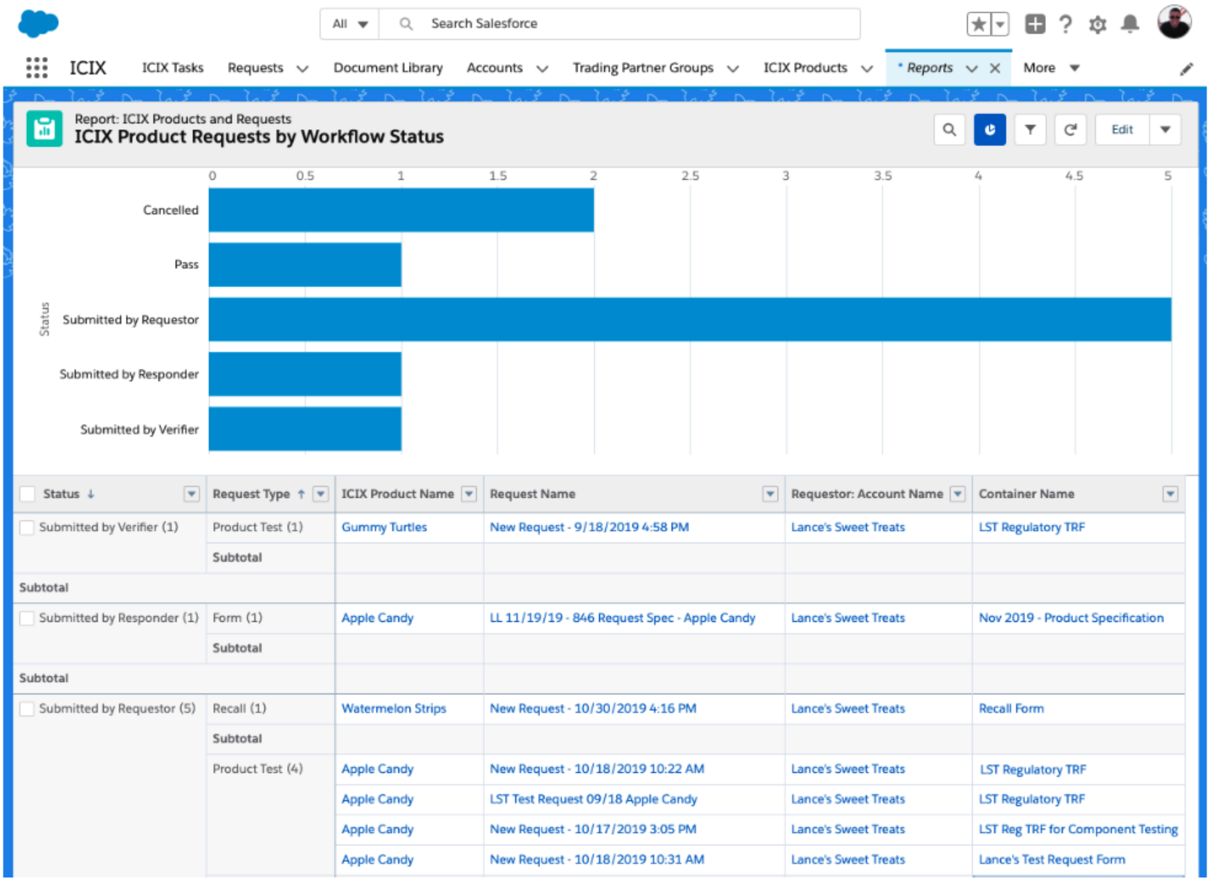
We've added units for you to use in the Product Test Manager that will flow through to your test requests for your connected verifiers to provide their testing results.

"%", "%/cell", "°C", "°F", "dB","as/kg", "Bq/kg", "m", "dm", "cm", "mm", "in", "in/s", "m2", "dm2", "cm2", "mm2", "m3", "cm3", "mm3", "ml", "L", "kg", "g", "mg", "µg", "lbf", "lbs", "g/kg", "g/L", "g/m2", "g/ml", "IA", "CFU", "CFU/g (CFU/ml)", "CFU/100ml", "Joules", "Joules/cm2", "mg Cd/kg", "mg lead/kg", "mg Pb/kg", "mg/item", "mg/m2/h", "mg/100g", "mg/cell", "mg/dm2", "mg/g", "mg/kg", "mg/L", "mg/m3", "mg/m3 (ml/m3)", "µg/100ml", "µg/cm2", "µg/cm2/week", "µg/dm2", "µg/m2", "µg/m3", "µg/m3 in 48h", "MPN/g", "N", "ohm/cm", "pH units", "ppb", "ppm", "psi", "seconds", "minutes", "hours", "N/A", "mg of each listed substance per litre of the aqueous simulant."

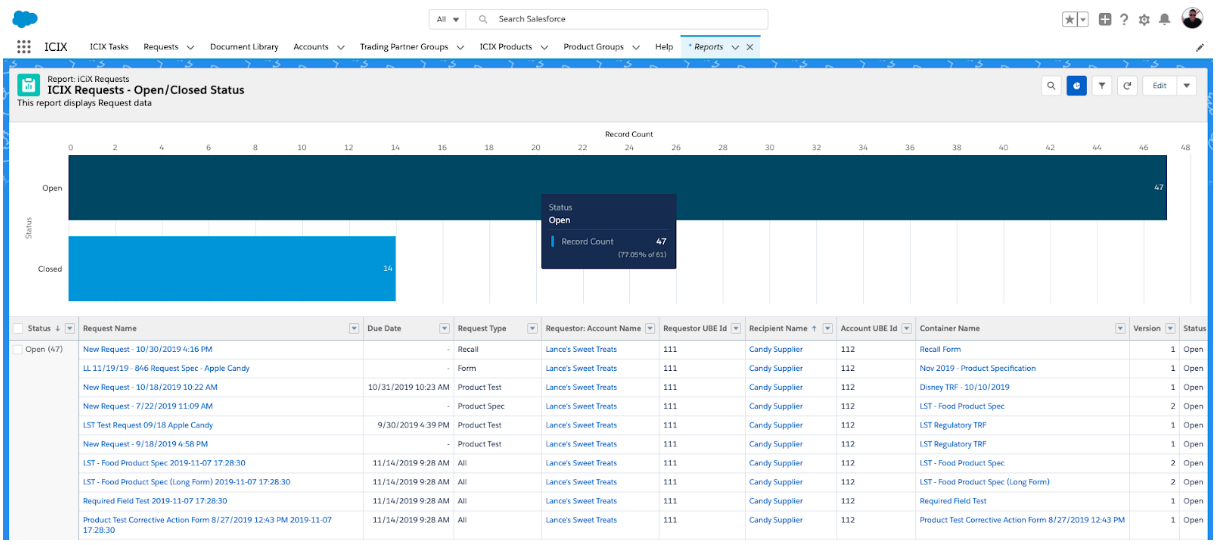
Reports - Generally Available Reports for Responders and Verifiers
In this release, responders and verifiers will have access to reports that pull in request and workflow status. Some of these reports are specific to Product Test, where users will be able to see the current state of a test request they are responding to throughout its lifecycle.

We have removed all of the older reports that are out-of-date for our Trading Partner community. These reports will be placed with 2 simple reports:

- ICIX Product Requests by Workflow Status



- ICIX Requests - Open/Closed Status



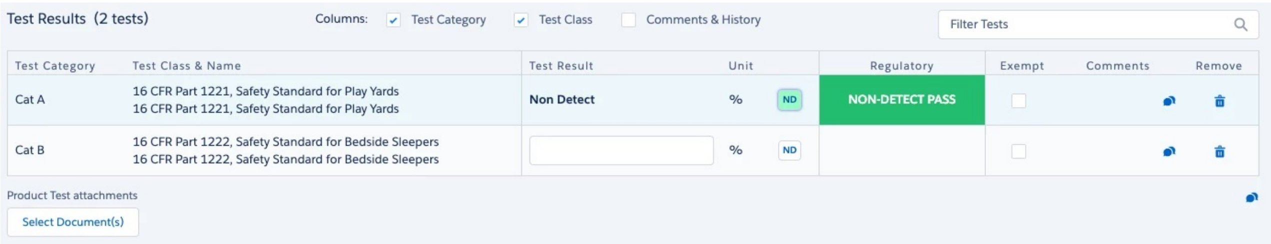
API - Unknown Component Test Results

In some use cases, you may have testing program requirements that require your testing verifier and/or trading partner to provide a list of components that make up your finished product. These components may not be known to you, so to provide a way for you to collect this data and the tests that were performed on each component, we are enabling this data to be collected via v4.0 and v5.0 of the ICIX API.

This API enhancement compliments the ability to enter in these "unknown" components manually. Please visit www.api.icix.com for documentation on this API update.

Product Test - Allow Non-Detect Pass for Quantitative Responses in PTM

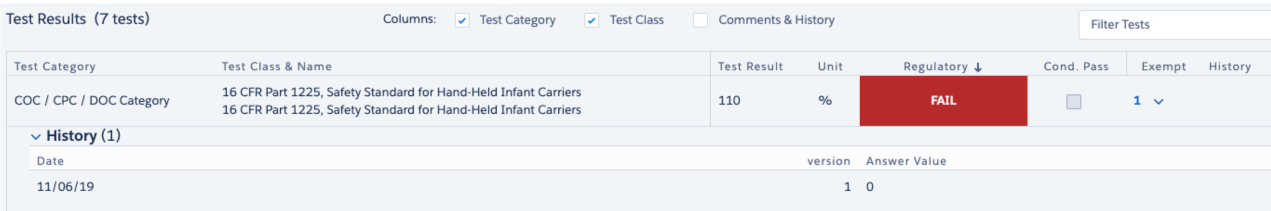
Users can now mark tests that don't require actual values as "Non-Detect Pass".



Product Test - Field History for Tests in TRF Table Component

Field updates made to test results throughout submission and rejection cycles are now captured for historical purposes.

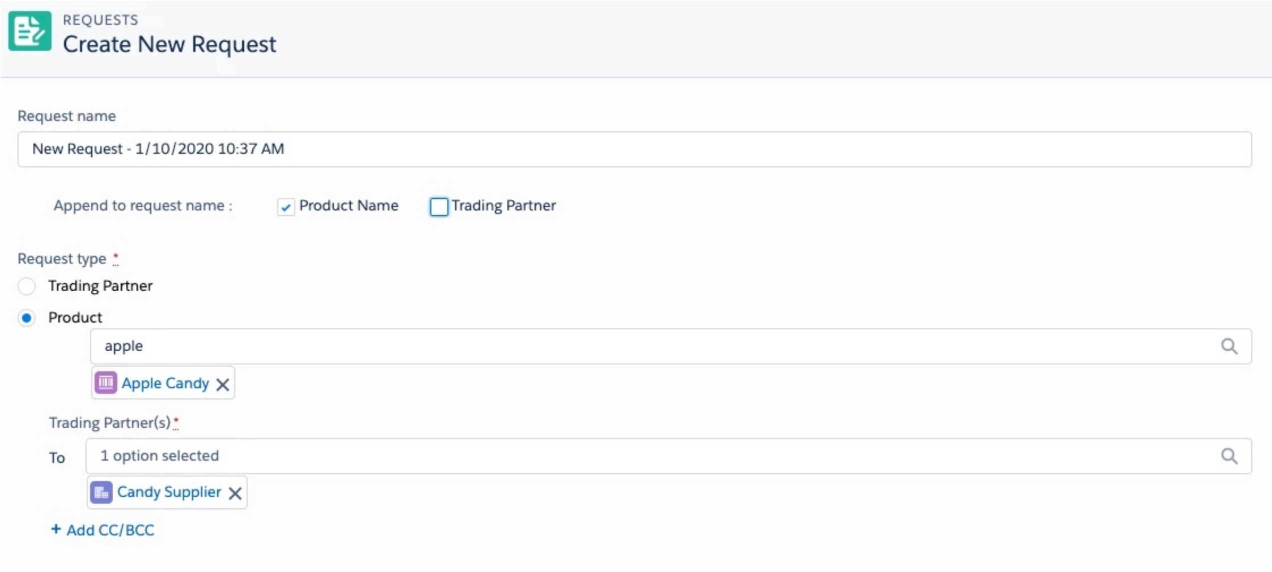
To view historical changes made to test items, click on the drop-down indicator in the History column.



Requests - Naming Convention Definitions

When creating a new request, you can now append the Product Name and/or Trading Partner name to the name of the request.

> **Known Bug:** You cannot choose a product group and have the product name and/or trading partner name appended to the request names. This issue will be addressed in a future release.



TRF - Add Tests Based on Product Test Attributes

For customers who are utilizing Product Test Attribute assignments in their testing programs, you can now use these attributes, along with pre-loaded tests, to add additional tests that are required for your product's testing during the pre-fill stage when creating a new request.

DOC Updates for Updated Regulations (CR-1336)

We've made some regulation changes to the DOC. These are small layout and ordering changes and we have removed a few items that are no longer needed to be reported on.

Winter '19 Major Release - v3.43 - January 13, 2020

Last Modified on 01/19/2021 9:00 pm PST

Release Date: January 13, 2020

Release Overview

What's New?

CRE for BRM - Due Dates for Rules

You can now set up default due dates for form validity rules that you create under the CRE for BRM. This functionality is very similar to the default due dates you create for setting up TP Group Requirements. We have default values such as 14, 30, 60, and 90 days. When the requests get sent out for expiring documents/forms, the due dates will be set based on the trigger date and the due date values you specify for each form validity rule.

ICIX API v5.0

In this release, you can now take advantage of refactored services for pushing and updating product in ICIX via v5.0 of the API.

API documentation is available at api.icix.com.

Some of the updates we have made are:

- Support for Attributes in the PO API
  - We added some default PO Attribute record in our package for use in our API: Source System, Department, Class, Sub-Class, Sub-Category, Distribution Region
- Refactored Add Products (Upsert) Service
- Add Products (Replace) Service
  - We now have the ability to replace products instead of removing and adding new ones in our API
- Product Testing Manager (PTM) Services
  - Testing Program
    - External IDs
    - Active From - Required (Not editable)
    - Active To - (Can be valid up to a year)
    - Testing Result Validation Period - Required
    - Active - Any edits to testing program makes it inactive.
    - Display Sample/ Defective Size - Field Name: Is Certification Program - True/False
    - Allow Conditional Pass - Field Name: ICIX_V1_*Is_Conditional_Pass_Allowed*_c - True/False
  - Test Categories
    - Test Category Name - Required
  - Product Test
    - Product Test Name
    - Test Class
    - Test Name
  - Product Test Attributes

    - Product Test Limits
- Product Test Manager Attributes to the Lab API (GetRequest)
    - Integration users now have the ability to view attributes related to the product lines in a GetRequest call.

Product Groups - Multi-Sourcing Enhancements
To satisfy customers running compliance programs that deal with their products being multi-sourced from different trading partners, we have modified our product group requirements engine. Product Groups look at all of the relationships you have with a given product, and will send off the proper requests for your requirements set for the product groups those products are members of. This includes our deduplication logic.

Requests - Auto-Approvals
Sometimes certain forms that you use to collect data/documents don't require manual approval or rejection. This feature enables you to configure requests that use a certain form to be automatically approved when the request is returned from our responder community. No tasks and no emails will be created for users for these automatically approved requests.

Forms - Additional Pre-Fillable Fields
The person using the form builder will be able to select the standard object associated with the field that they need to be pre-filled into a Form Question's Answer Option.

Product Test - Product Test Attributes - Full Release
Instead of manually applying tests to products, you can now utilize product test attributes, which will automatically assign tests to products based on attributes that are assigned to products. Product Test Attributes can be used to tag tests with values that drive test-to-product assignment. Instead of assigning an entire category of tests to a product for use in a test request, Product Test Attributes are a way of filtering out only those tests that meet certain requirements.

PT - Watermarks for Product Test Certificates
If you want to add a custom watermark per certificate, you can do so by uploading an image into Salesforce Files and then go into the Product Test Manager and select the image you want to use.

General UI/UX Updates

- Account Search - search results appear on the same page
- TP Groups and Product Groups - required fields show as mandatory
- Create New ICIX Product - search results appear on the same page
- All button actions - we have cleaned up some spacing around action buttons on all pages
- UX Stencil Update - the ICIX Tasks page now shows the proper loading template before displaying results

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PT - Start and End Dates for Tests in the PTM
The Product Test Manager now has two new standard fields added to test records and displayed in the PTM within a category: Start Date and End Date. These two fields do not have any business logic tied to them within the

application. They are purely for reporting purposes that customers can use to manage their future matrix updates over time.

Unknown Component Testing in TRF and Lab API

As a Verifier through manual input or through the v5.0 API, you can add testing information against each Component/Part of the product so that each part can be analyzed for product safety.

In the Test Request Form, a table can be configured during ICIX Product Test implementation to capture product component information. Some examples of this include a component ID number, component name, location, style, etc.

Within the Test Results table in the TRF, the provided component information can be referred to by the verifier as supplemental data.

Patch - v3.35.2 - November 25, 2019

Last Modified on 11/25/2019 3:42 pm PST

Release Date: September 9, 2019

General Fixes

- ICIX Tasks - Fixed an intermittent issue where lab-submitted TRFs were not visible on the ICIX Tasks page.
- Product Spec - Fixed an intermittent issue where submitted data was stored in the database but not always loading into the Product Specification container template properly.

Patch - v3.35.1 - November 18, 2019

Last Modified on 11/18/2019 3:46 pm PST

Release Date: November 18, 2019

Bug Fixes

- Product Test - Test results show Pass/Fail incorrectly when some tests are deactivated
- Audit - Vendor names are still not displaying on Audits even when the system indicates that the Vendor Name is populated

Patch - v3.35 - October 1, 2019

Last Modified on 10/01/2019 12:25 pm PDT

Release Date: October 1, 2019

What's New?

Feature Flag for Task Grouping

In this release, ICIX will be able to turn ON/OFF the Task Grouping feature for related requests. By default, when multiple requests are sent off to the same Trading Partner at the same time, those requests will share the same related request ID. This ID is what is used to group together similar requests on the ICIX Tasks page for easier visibility of tasks. If you would like this feature to be turned off, please contact your ICIX representative.

Bug Fixes

- ICIX Tasks - User redirected away from grouped task when updating one task
- ICIX Tasks - Search is not working for grouped tasks

Patch - v3.33 - September 9, 2019

Last Modified on 09/30/2019 10:19 am PDT

Release Date: September 9, 2019

General Fixes

- CR-1175 - Handle Country/state mismatch
- CR-1179 - Form with Answer Type "Query Requester" is failing with error "Attempt to de-reference a null object" when used with "Relationship Queries"
- CR-1183 - Write message in API is causing add product batch jobs to fail as of 3.31

Summer '19 Major Release - v3.31 - August 12, 2019

Last Modified on 01/19/2021 8:59 pm PST

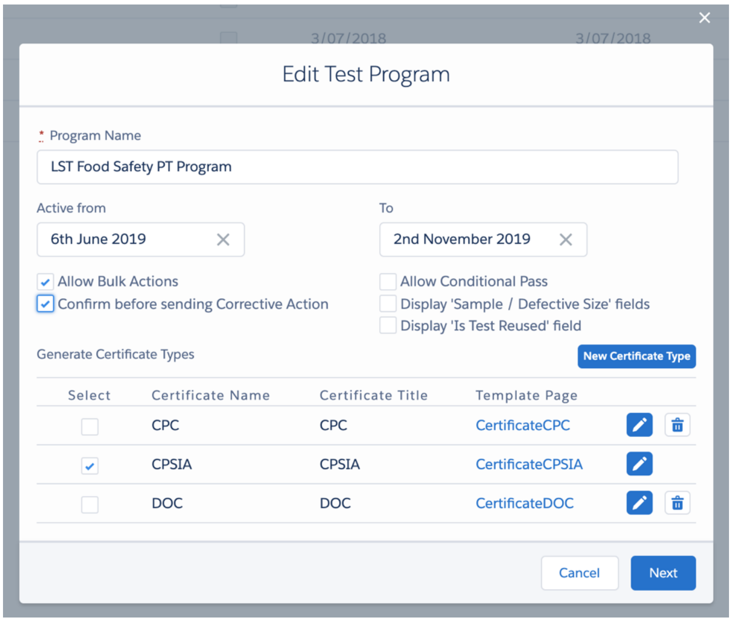
Release Date: August 12, 2019

What's New?

Product Testing - Corrective Action Rules

For those unfortunate failing test results, you can now decide if corrective actions will be sent out to your TPs for a response. The rules that drive this setting can be configured based on the testing programs you are using today in ICIX. For each testing program, you can decide whether or not you want to automatically trigger corrective actions for failing tests or enable a manual intervention step.

> This feature cannot be applied to existing, open requests. If the setting is enabled for a testing program, the confirmation screen will only work for new test requests.



When you are approving a failing test result coming back from a verifier, you should click on the Approve button located on the ICIX Task record. When you do this you should see a pop-up that asks if you want to submit a corrective action for those failing tests, or not.

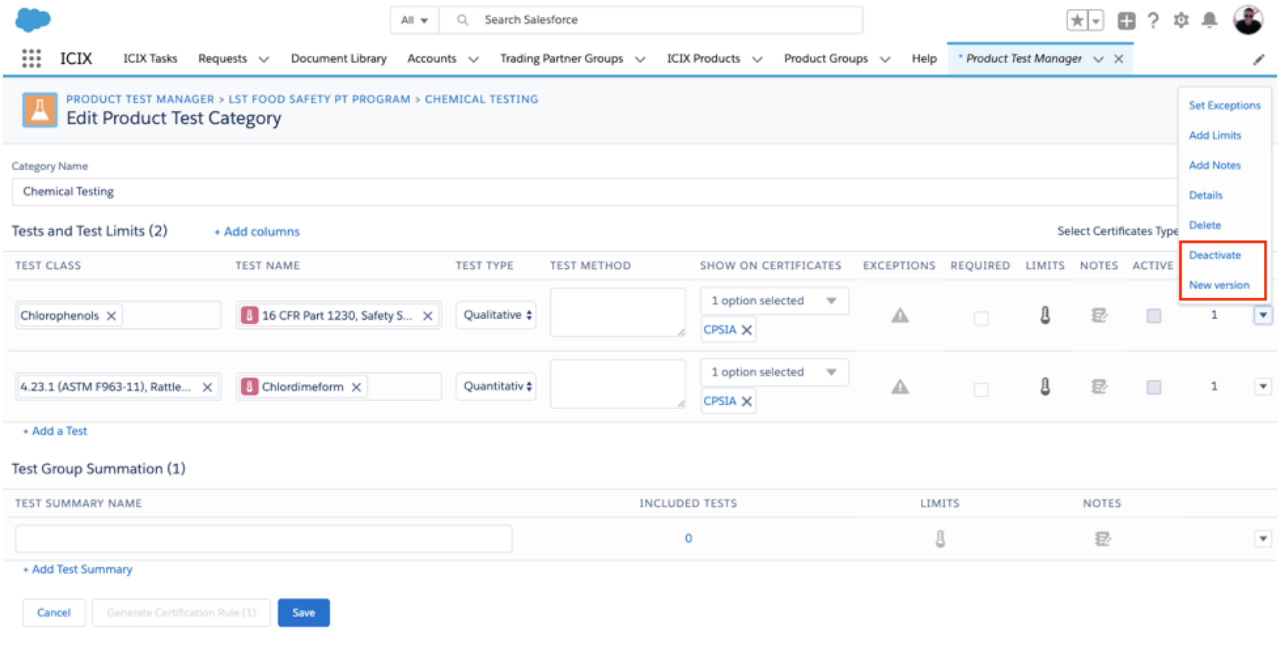
Product Testing - Testing Program Updates for ICIX Users

Customer admins can now update active testing programs. In earlier versions of ICIX, testing programs needed to be cloned and then reapplied to products in order to put new changes in effect. In the Summer '19 release, you can now make a few modifications like deactivating a test or making a new version of a test and all new requests that get sent off will pick up from the latest program details.

Tests can now be deactivated and versioned based on your testing program updates. All new requests will pick up the latest changes at all times.

What can you modify when you create a new version? You can only modify the Tests Limits on a test.

What can you modify when you Add a Test? You can modify anything that is usually editable when you are adding a test for the first time.

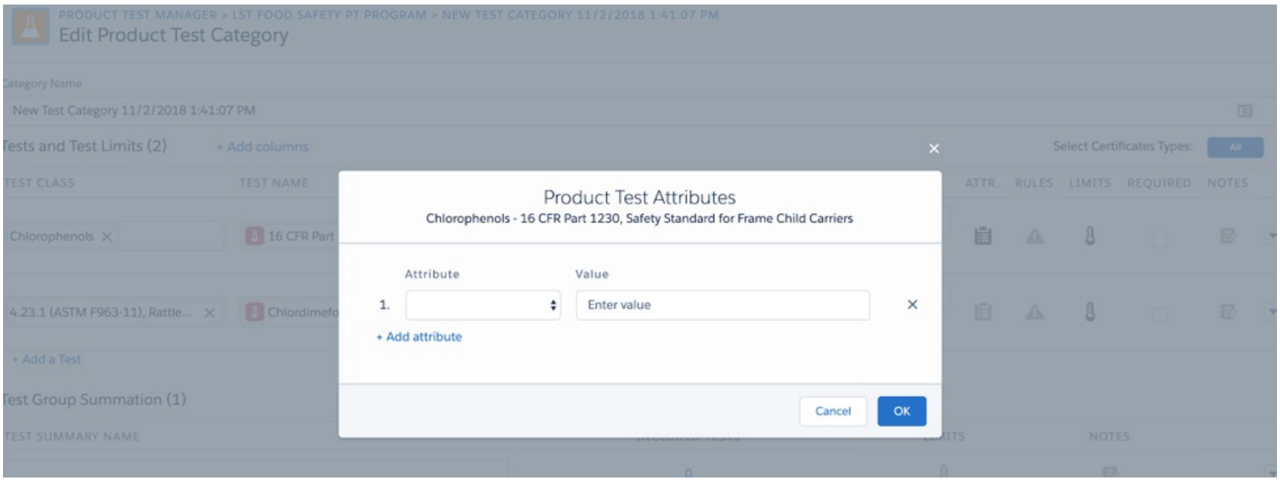


Product Testing - Product Test Attributes UI Only

Instead of manually applying tests to products, you can now utilize product test attributes, which will automatically assign tests to products based on attributes that are assigned to products.

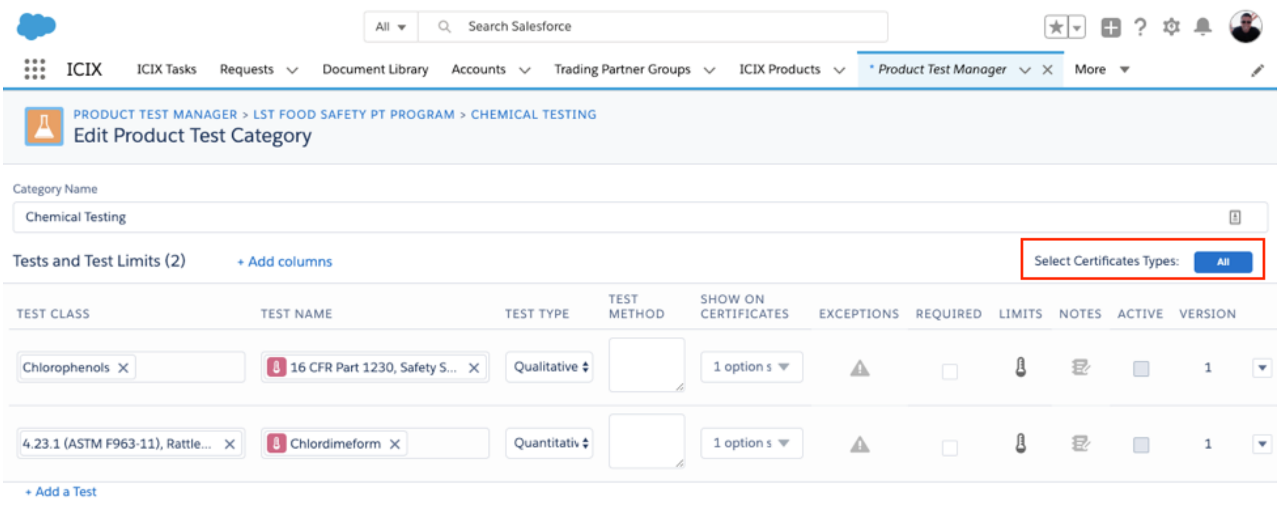
Product Test Attributes can be used to tag tests with values that drive test-to-product assignment. Instead of assigning an entire category of tests to a product for use in a test request, Product Test Attributes are a way of filtering out only those tests that meet certain requirements.

In this release, you will only be able to play around with the UI of adding Product Test Attributes to your test items within your testing categories. The assignment of Product Test Attributes to ICIX Product records will be available in a later release.



Product Testing - Bulk Certificate Assignment

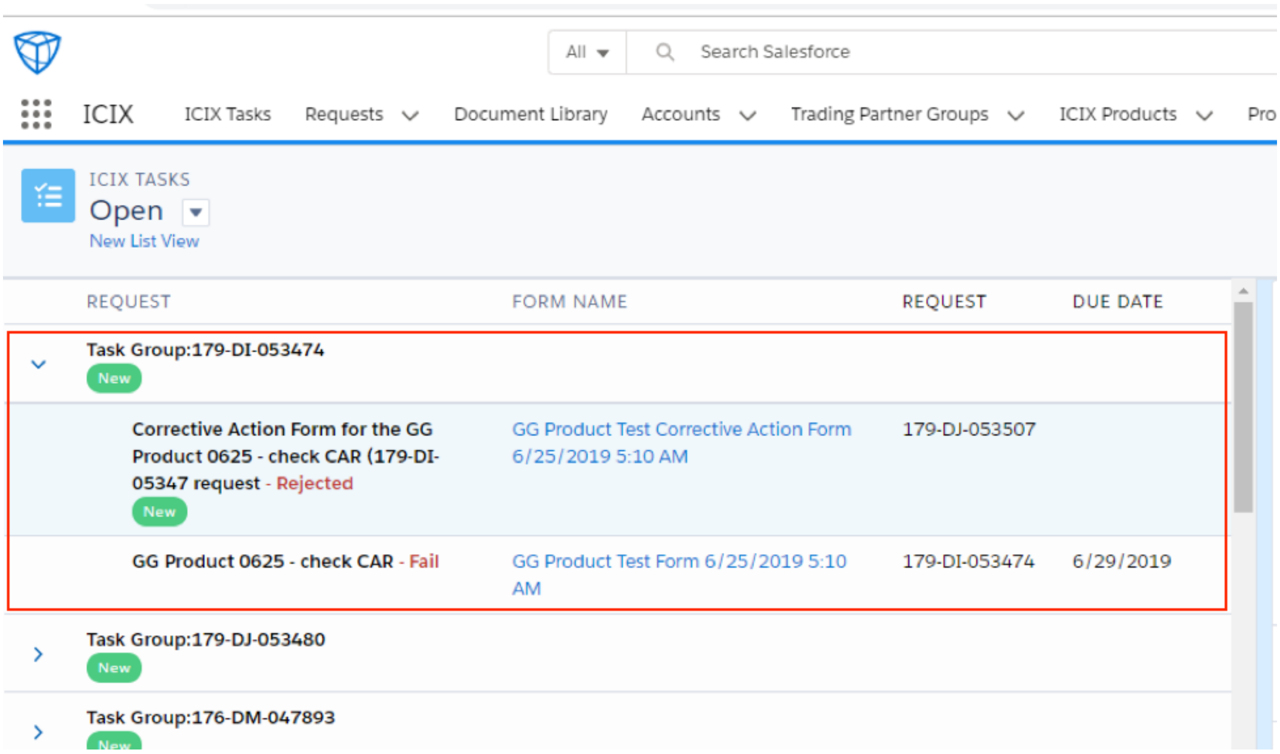
Instead of manually applying certificates to tests within your testing category, you can now use the bulk certificate assignment feature. This feature enables you to assign the same certificate template to all of the tests in your testing category. This drastically speeds up the process of implementing a new testing program where certificate generation is one of your business requirements.



Product Testing - Corrective Action Default Grouping

For corrective actions that are sent off as a result of failing test results in a product test request, we now group together corrective action tasks with the parent product test request so that it's easier to find corrective actions in the new ICIX Tasks Page.

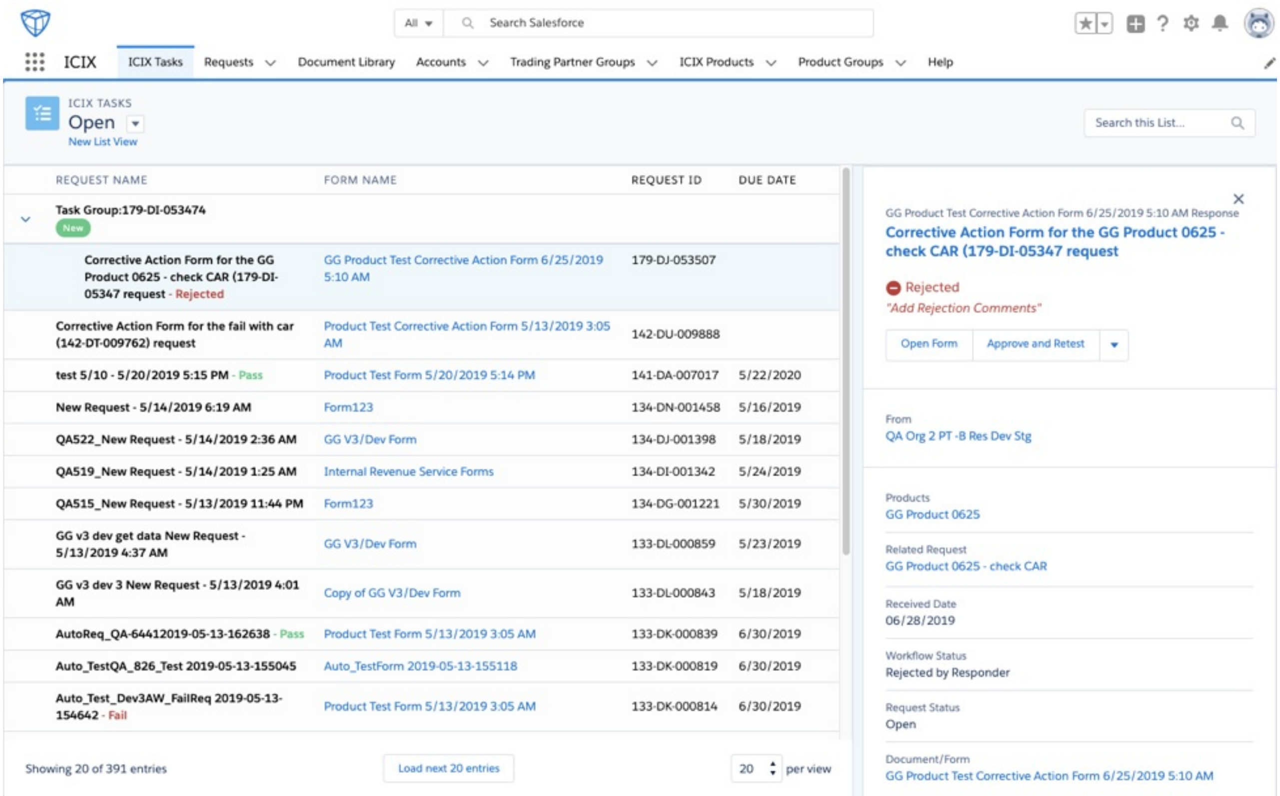
This functionality can also be extended to Audit Conduct users.



ICIX Tasks Page - Refreshed!

Our ICIX Tasks Page needed a little dusting. In this release, you will interact with an updated ICIX Tasks Page that includes new features like Task Searching, more stable filters, and a separated notifications list view from “to-do” tasks that actually require action from you as a user.

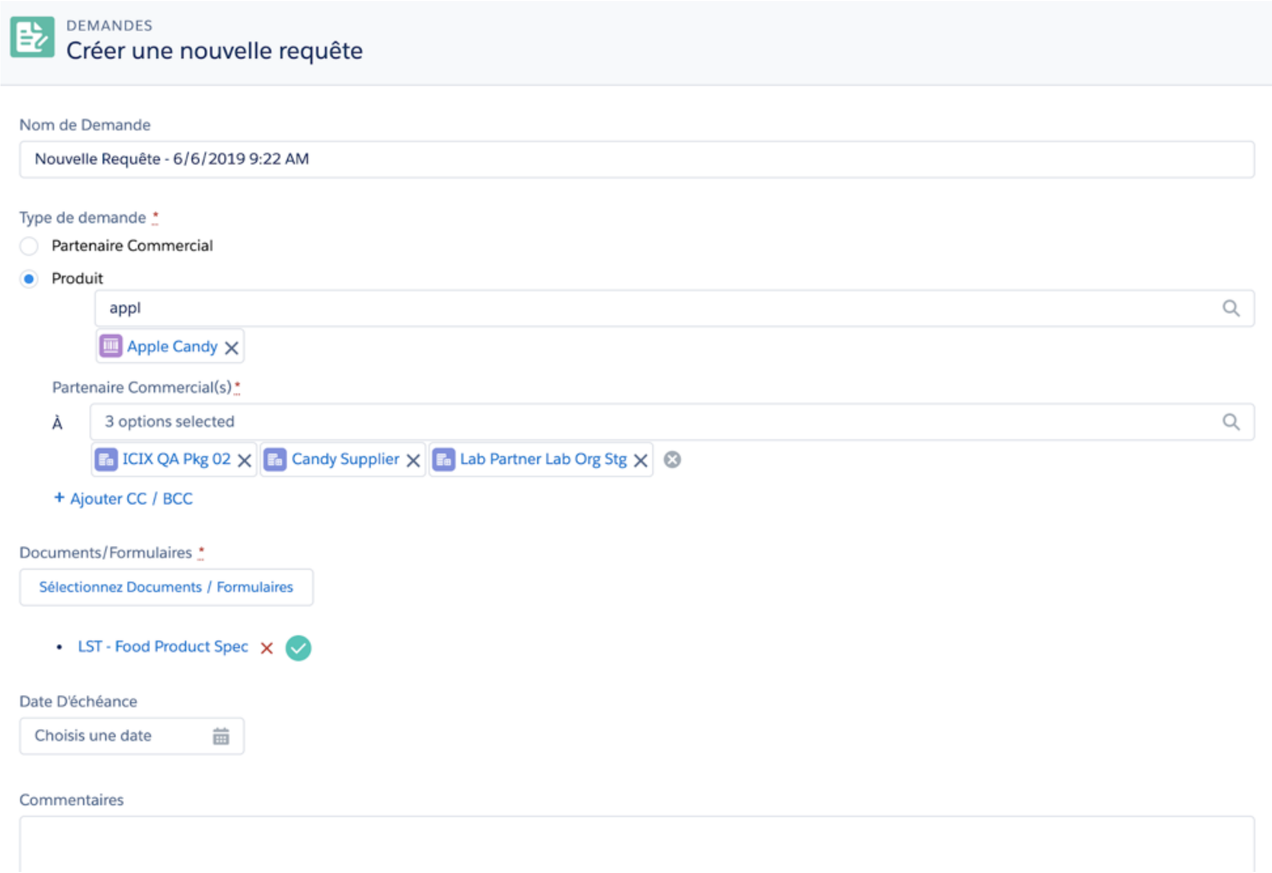
What has been added as new features?
1. Searching within the list of ICIX Tasks. Essentially, any field you can visibly see in the UI is searchable. Even if you are only looking at 20 of 100 ICIX Tasks, the search will still return results.
2. We have separated notifications (Mark as Completed) from Open Tasks, which are tasks that a user must respond to such as filling out a form, uploading a document, or approving/rejecting a returned request from a supplier.



ICIX Language Translation

ICIX is now translated as a user’s locale and language settings are updated in Salesforce. Some of our custom VisualForce pages that are used to perform actions in ICIX are translated into:

- English, French, Chinese - Simplified, Chinese - Traditional, Japanese, Spanish
- ICIX Tasks Page, Create New Request Page, Document Library, Form View Buttons and Components



BRM - New TP Relationship Types

New Trading Partner Relationship Types have been added to this package. Licensee and Service Provider are available to use when defining your TP Relationships and building TP Groups.

Reports - Dashboard of Reports for Status of Messages Sent/Received in Heroku

We have included a report titled "Request Acknowledgements Report" and is available for system administrators to view. If you go to the Reports tab > All Reports, you will find the report.

The reports shows a list of requests (messages) sent to Heroku and the Request ID, Request Name, Created Date, Status, Recipient Name, Error Message, etc.

Ability to Create Additional ICIX Product Relationships

You may already have this type of data set up in their orgs, but in this release, users will be able to create additional ICIX Product Relationships straight from the ICIX Product Page.

To create an additional ICIX Product Relationship, you should go to ICIX Product > ICIX Product Relationships and then click on the NEW button. By default the NEW buttons is not visible to you.

Get Data - Previously Published Versions of Container Templates

The Get Data feature in our forms can now be used for previous versions of the same Container Template.

Riskonnect ESG Data Processing Addendum

Last Modified on 06/03/2022 6:15 pm PDT

Riskonnect ESG - Salesforce.com Platform Service Agreement

Last Modified on 06/03/2022 6:14 pm PDT

Riskonnect ESG Terms for Responders

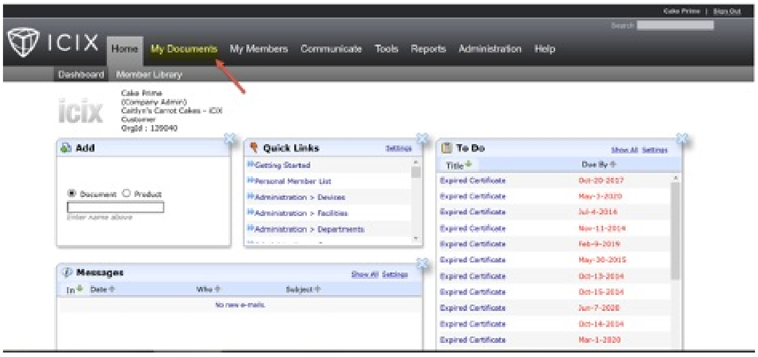
Last Modified on 06/03/2022 6:15 pm PDT

How to Download a Document From ICIX Classic

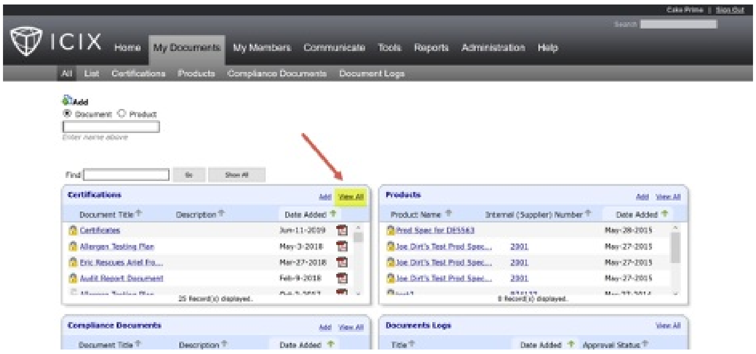
Last Modified on 06/03/2022 6:01 pm PDT

To download a document from ICIX Classic:

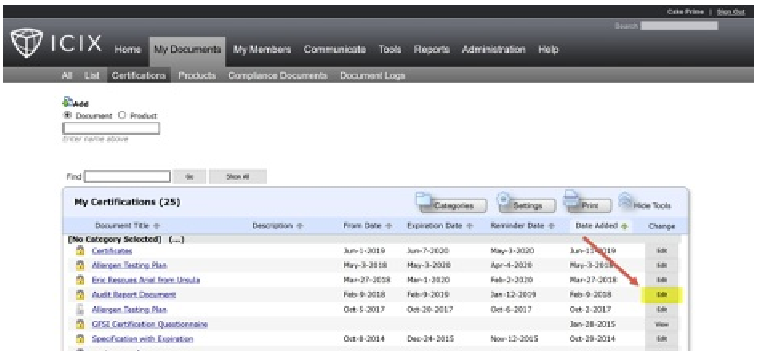
1. Login to ICIX Classic by going to cloud.icix.com.
2. Once logged in select "My Documents".



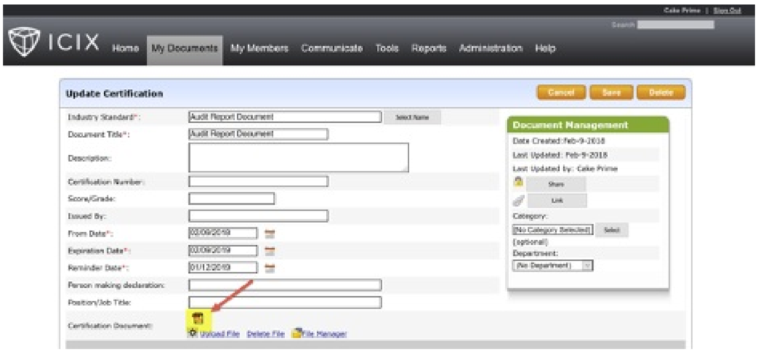
3. Select "View All" for the category of document you want to download (or directly on the pdf icon if available).



4. Select "Edit" next to the document you would like to download.



5. Select the PDF icon for the document to download to your computer.



You have successfully downloaded your document from Riskonnect ESG Classic.
Note: The steps and images above may vary depending on your own browser settings.

North America, Europe, South America, Asia - ICIX Classic Sunsetting December 31, 2020 Notice

Last Modified on 10/26/2020 10:41 am PDT

Australia and New Zealand - ICIX Classic Sunsetting December 31, 2020 Notice

Last Modified on 10/26/2020 10:42 am PDT
