January 2024 Release Notes				Help Center Content					Information Design		Adherence to Style Guide		
Release Note Name	Task	Page	New or Updated Features	Keywords Searched	Help Center Name	Help Center Path	Proposed Placement	Includes Screenshot Y/N	Content Type	High-Priority Information Needs	Passive Terms Used	Banned Terms Used	General Note
Add change history for DEE and associated actions	To track changes to actions on DEEs	55		ClientZ Settings	ClientZ Settings Screen	Topics/ClientZ Service administration/ClientZ Settings	Add information	Y	UI reference	Administrator Only Settings; Workflow	can be accessed, is reflected, are documented	None found	Orange wrench
Add change history for DEE and associated actions	To track changes to actions on DEEs	55		ClientZ Settings	Add Setting for Migration screen	Topics/Administration/Configuration migration/Add Setting for Migration screen	Setting options table (better suited for ClientZ.AuditedDomains?)	Y	UI reference	Workflow	can be customized, is generated, is migrated, to be imported,	Remove, type	Help Center name doesn't start with gerund; orange wrench
Add change history for DEE and associated actions	To track changes to actions on DEEs	55		ClientZ Administration	Creating migration exports	Topics/Administration/Configuration migration/Creating migration exports	Add task	Y	Task	Forms, Fields, Data Entry Events (admin)	can be customized, is added, is created	None found	Orange wrench within page.
Add change history for DEE and associated actions	To track changes to actions on DEEs	55		ClientZ.AuditedDomains	Checking record change history	Topics/Administration/Troubleshooting/Checking domain changes	Add task	Y	Task	Workflow	can be customized, are displayed	None found	Orange wrench
Assign a team using FTE on a new user assignment data entry event (DEE) action		56	New fields	Form Tag Extension	Managing form tag extensions	Topics/Administration/Forms and fields/Managing form tag extensions	Add task	Y	Task	Forms, Fields, Data Entry Events (admin)	can be customized, is copied, is used	None found	Release Notes pg. 56 contain passive voice.
Assign a team using FTE on a new user assignment data entry event (DEE) action		56	New fields	Form Tag Extension	About forms and fields	Topics/Administration/Forms and fields/About forms and fields	Add information	Y	About	Forms, Fields, Data Entry Events (admin)	is configured, are grouped, is displayed, is provided, can be created, are deployed, are stored, are displayed, can be used, can be added, to be notified, are used, to be accessed, can be submitted, is filed, is created, is limited,	Boxes, done, perform, set up	Orange wrench within page.
Manually fire data entry events on the users domain and view bulk action events from the more menu	Update the relevant permissions	57	New role permissions, New fields	Permissions assigned to role	Permissions Assigned to Role screen	Topics/Administration/User security/Permissions Assigned to Role screen	Within 'What you can do on the screen' table.	Y	UI reference	Users (Admin)	can be customized, is accessed	Remove	
Manually fire data entry events on the users domain and view bulk action events from the more menu	To setup the ability to manually fire data entry events created on the Users domain	58	New role permissions, New fields	Fire	Data Entry Events	Topics/Concepts and definitions/Data entry events	Add information	Y	Concept	Workflow; Forms, Fields, Data Entry Events (Admin); Claims & Incidents	is called; were refired; is fired	None found	Release Note task name contains 'setup', which is a banned word.
Use email templates for DEE	To add a template to an existing email	59	New fields	Email template	Creating templates	Topics/Administration/Forms and fields/Creating templates	Add task [Add a hyperlink to 'Data Entry Events' page. In 'Data Entry Events' page, create an 'Email Template for DEE' section.]	N	Task	Workflow	can be customized, is created	None found	
Use email templates for DEE	To create a new email using a template	59	New fields	Email template	Creating templates	Topics/Administration/Forms and fields/Creating templates	Add task [Add a hyperlink to 'Data Entry Events' page. In 'Data Entry Events' page, create an 'Email Template for DEE' section.]	N	Task	Workflow	can be customized, is created	None found	
Trigger multiple rules simulatenously	To enable the Underwriting Rules Triggered check box in a new DEE	60	New fields	Trigger underwriting rules	Managing underwriting rules	Topics/Policies and billing/Managing underwriting rules	Add task [Add a hyperlink to 'Data Entry Events' page in step 5 'Too add an action to an underwriting rule' section. In 'Data Entry Events' page, create an 'Trigger Rules for DEE' section.]	Y	Task	Workflow	can be customized, are checked, is required, is added, is triggered	Program, remove	orange wrench
Trigger multiple rules simulatenously	To enable the Underwriting Rules Triggered check box in a new DEE	60	New fields	Trigger underwriting rules	Managing underwriting rules	Topics/Policies and billing/Managing underwriting rules	Add task [Add a hyperlink to 'Data Entry Events' page in step 5 'Too add an action to an underwriting rule' section. In 'Data Entry Events' page, create an 'Trigger Rules for DEE' section.]	Y	Task	Workflow	can be customized, are checked, is required, is added, is triggered	Program, remove	orange wrench
Add custom fields and custom views to document control templates		61		Document controls template	Uploading a document template	Topics/GRC/PPM/Uploading a document template	Add task [Add a section titled 'Editing Document Control Templates'.]	Y	Task	Workflow	can be customized, is required	Remove	
Configure the document control source panel on the document control form		62		Document control	New Document Control screen	Topics/EHS/Environmental and regulatory compliance/New Document Control screen	Add information [Add a 'Configuring Document Control Source Panel' section.]	Y	UI reference	Workflow	can be customized, is added, is displayed, is renewed, is created	None found	
Use an existing document control record as a template	Update the relevant permissions	62	New role permissions		No results								
Use an existing document control record as a template	To create a blueprint	63	New role permissions	Document template	Uploading a document template	Topics/GRC/PPM/Uploading a document template	Add task [Relabel the 'Uploading a document template' to something more generic like 'Document Templates'. You can then add information about configuring, adding, templates, records, etc.]	Y	Task	Workflow	can be customized, is required	Remove	
Use an existing document control record as a template	To create a blueprint from an existing document control	63	New role permissions	Document template	Uploading a document template	Topics/GRC/PPM/Uploading a document template	Add task [Relabel the 'Uploading a document template' to something more generic like 'Document Templates'. You can then add information about configuring, adding, templates, records, etc.]	Y	Task	Workflow	can be customized, is required	Remove	
Use an existing document control record as a template	To edit a blueprint	63	New role permissions	Document template	Uploading a document template	Topics/GRC/PPM/Uploading a document template	Add task [Relabel the 'Uploading a document template' to something more generic like 'Document Templates'. You can then add information about configuring, adding, templates, records, etc.]	Y	Task	Workflow	can be customized, is required	Remove	
Use an existing document control record as a template	To delete a blueprint	64	New role permissions	Document template	Uploading a document template	Topics/GRC/PPM/Uploading a document template	Add task [Relabel the 'Uploading a document template' to something more generic like 'Document Templates'. You can then add information about configuring, adding, templates, records, etc.]	Y	Task	Workflow	can be customized, is required	Remove	

Use an existing document control record as a template	To create a document control from a blueprint	64	New role permissions	Document template	Uploading a document template	Topics/GRC/PPM/Uploading a document template	Add task [Relabel the 'Uploading a document template' to something more generic like 'Document Templates'. You can then add information about configuring, adding, templates, records, etc.]	Y	Task	Workflow	can be customized, is required	Remove	
Access a QR code link for a document control	To print a single QR code	65		Document controls	Document controls	Topics/Concepts and definitions/Document controls	Add information [Add section under 'Actions for document controls' that details QR code capabilities. Or create a designated QR code topic and place a link in the 'Document Controls' topic.]	N	Concept	Users (admin)	was published	None found	
Access a QR code link for a document control	To bulk print multiple QR codes	65		Document controls	Document controls	Topics/Concepts and definitions/Document controls	Add information [Add section under 'Actions for document controls' that details QR code capabilities. Or create a designated QR code topic and place a link in the 'Document Controls' topic.]	N	Concept	Users (admin)	was published	None found	
Re-assign and resend element update requests to recipients	To reassign a BCM plan elements	66		BCM Plan	About the Business Continuity Management module	Topics/GRC/BCM/About Business Continuity Management	Add information [Recommend building out this page to include task-oriented sections. You can replace the 'Use your continuity plan' section since that information is stated in the intro and replace with task-oriented headers.]	Y	About	Users (admin)	are interrupted, is interrupted,	None found	
Re-assign and resend element update requests to recipients	To resend element updates	66		BCM Plan	About the Business Continuity Management module	Topics/GRC/BCM/About Business Continuity Management	Add information [Recommend building out this page to include task-oriented sections. You can replace the 'Use your continuity plan' section since that information is stated in the intro and replace with task-oriented headers.]	Y	About	Users (admin)	are interrupted, is interrupted,	None found	Business Continuity Management (BCM) Plan vs BC Plan. Is there a difference?
Use tags to automatically create the elements in a document template	Add tags to your .docx document before import	67		Document template	Uploading a document template	Topics/GRC/PPM/Uploading a document template	Add task [Relabel the 'Uploading a document template' to something more generic like 'Document Templates'. You can then add information about configuring, adding, templates, records, etc.]	Y	Task	Workflow	can be customized, is required	Remove	
Use tags to automatically create the elements in a document template	Add tags to an existing .docx document control	68		Document template	Uploading a document template	Topics/GRC/PPM/Uploading a document template	Add task [Relabel the 'Uploading a document template' to something more generic like 'Document Templates'. You can then add information about configuring, adding, templates, records, etc.]	Y	Task	Workflow	can be customized, is required	Remove	BCM from previous section and BCP in this section. Is there a difference?; Confirming 'Document Controls' and 'Document Control section' are different?
Use tags to automatically create the elements in a document template	Available tag pairs	68		Document Template	Uploading a document template	Topics/GRC/PPM/Uploading a document template	Add task [Relabel the 'Uploading a document template' to something more generic like 'Document Templates'. You can then add information about configuring, adding, templates, records, etc.]	Y	Task	Workflow	can be customized, is required	Remove	BCM from previous section and BCP in this section. Is there a difference?; Confirming 'Document Controls' and 'Document Control section' are different?
Use tags to automatically create the elements in a document template	Tag parameters	68		Document Template	Uploading a document template	Topics/GRC/PPM/Uploading a document template	Add task [Relabel the 'Uploading a document template' to something more generic like 'Document Templates'. You can then add information about configuring, adding, templates, records, etc.]	Y	Task	Workflow	can be customized, is required	Remove	BCM from previous section and BCP in this section. Is there a difference?; Confirming 'Document Controls' and 'Document Control section' are different?
Use tags to automatically create the elements in a document template	Full document example	69		Document Template	Uploading a document template	Topics/GRC/PPM/Uploading a document template	Add task [Relabel the 'Uploading a document template' to something more generic like 'Document Templates'. You can then add information about configuring, adding, templates, records, etc.]	Y	Task	Workflow	can be customized, is required	Remove	BCM from previous section and BCP in this section. Is there a difference?; Confirming 'Document Controls' and 'Document Control section' are different?
Exclude mail merge templates from agent-type users	To exclude agent-type users from using a mail merge template	70	New fields	Mail Merge Templates	Managing mail merge templates	Topics/Administration/Forms and fields/Managing mail merge templates	To delete a mail merge template	Y	Task	Workflow	N/A	as , remove, set up , icon	
Apply the late fee charges to PayAsYouGo and pending invoices	To remove late fee charges from PayAsYouGo invoices	71		Enable late fees	New Billing Profile screen	Topics/Policies and billing/New Billing Profile screen	Late fee options	Y	UI reference	Claims & Incidents; Workflow	is generated, must be paid, is automatically generated, is split evenly, is overpaid, is used, is sent, is subtracted, is created, is adjusted, is canceled, are temporarily paused, can be collected, is charged, is bound, is billed, are displayed, is rounded, is selected, is reinstated	done	
Apply the late fee charges to PayAsYouGo and pending invoices	To verify that late fee charges are applied to PayAsYouGo and pending invoices	71		Enable late fees	New Billing Profile screen	Topics/Policies and billing/New Billing Profile screen	Late fee options	Y	UI reference	Claims & Incidents; Workflow	is generated, must be paid, is automatically generated, is split evenly, is overpaid, is used, is sent, is subtracted, is created, is adjusted, is canceled, are temporarily paused, can be collected, is charged, is bound, is billed, are displayed, is rounded, is selected, is reinstated	done	

Configure a security deposit on a non pay as you go billing frequency	N/A	72		Billing frequencies	Adding installment options to billing profiles	Topics/Policies and billing/Adding installment options to billing profiles	To add an installment option	N	Task	Claims & Incidents	could configure, can be configured, is saved	None found	
Transfer payment from one billing account to another	To allocate unused amount to another billing account	73	New role permissions	Billing Accounts, Billing Payment, Allocation	No results								
Transfer payment from one billing account to another	Update the relevant permissions	73	New role permissions	Allocate to other billing accounts	New Billing Profile screen	Topics/Policies and billing/New Billing Profile screen	Billing profile options	Y	UI reference	Claims & Incidents; Workflow	is generated, must be paid, is automatically generated, is split evenly, is overpaid, is used, is sent, is subtracted, is created, is adjusted, is canceled, are temporarily paused, can be collected, is charged, is bound, is billed, are displayed, is rounded, is selected, is reinstated	done	
Attach mail merge documents created from a policy change data entry event to a policy	N/A	74	New fields	Policy change DEE	New Action screen (DEE)	Topics/Administration/Forms and fields/New Action screen (DEE)	Attachment options	Y	UI	Forms, Fields, Data Entry Events; Users; Workflow	to be triggered; is assigned; can be customized; to be completed; is created; is modified; is triggered	None found	
"Equity Billing" is now called "Earned Premium Billing"	To view the Earned Premium Billing Options section in the Default Billing Profile screen	74		Equity Billing Options	New Billing Profile screen	Topics/Policies and billing/New Billing Profile screen	Equity billing options	Y	UI reference	Claims & Incidents; Workflow	is generated, must be paid, is automatically generated, is split evenly, is overpaid, is used, is sent, is subtracted, is created, is adjusted, is canceled, are temporarily paused, can be collected, is charged, is bound, is billed, are displayed, is rounded, is selected, is reinstated	done	
Configure audit type transactions	Allow an audit endorsement type transaction to be a final audit	76	New fields	Policy schedule	Policy schedule screen	Topics/Policies and billing/Policy Schedule screen	Schedule loading options	Y	UI reference	Workflow	is added, is displayed, is selected, are created, can be edited, is loaded, are automatically added, is entered	later	
Configure audit type transactions	Allow a rating program policy line to be audited during a policy endorsement transaction	77	New fields	Rating Programs	Creating rating programs	Topics/Policies and billing/Creating rating programs	Creating rating programs	N	Task	Workflow	none found	perform	Orange wrench
Configure audit type transactions	Allow a rating program schedule to be editable on an audit transaction	77	New fields	Schedule Table Calculations	Rating program calculation fields screen	Topics/Policies and billing/Rating Program Calculation Field screen	Policy schedule options	Y	UI reference	Policies & Programs; Forms, Fields, Data Entry Events; Claims & Incidents; Workflow	is replaced; is added; is selected; can be customized; is calculated; is reported; is included	perform	
Configure audit type transactions	Add a new audit type	77	New fields	Add a new audit type	New Audit Definition Screen	Topics/Administration/Forms and fields/New Audit Definition screen	Audit definition options	Y	UI reference	Workflow	can be customized, is added, are assigned, is created, is used	box, remove, text box	
Configure audit type transactions	Create a final audit from a policy	78	New fields	Auditable Policy Lines	New Rating Program screen	Topics/Policies and billing/New Rating Program screen	Policy coverage and policy line options	Y	UI reference	Workflow; Policies & Programs; Forms, Fields, Data Entry Events; Users	is used; is displayed; is generated; are cleared; are selected; can be assigned; is locked; are endorsed; are rated; is issued; are notified; is formatted; can be viewed; are added; is linked; are predifined; is created; is reached; can be customized; is calculated; is reinstated; is bound but not issued; are renewed; is canceled; are applied;	perform, later	
Configure email notification recipients for asynchronously generated forms	To manually configure receiving email notifications	79	New ClientZ settings	ClientZ Settings	ClientZ Settings screen	Topics/ClientZ Service administration/ClientZ Settings	To find the descriptions of ClientZ settings	Y	UI reference	Administrator Only Settings; Workflow	can be accessed, is reflected, are documented	None found	Orange wrench
Configure email notification recipients for asynchronously generated forms	To manually configure email notifications on a proposal by proposal basis	79		Underwriting, All Proposals, Notification Preferences	No results								
Manage configuration of insufficient funds fee at the billing account level	To configure the Insufficient Funds Fee section	80	New fields	Billing Settings screen	New Billing Profile screen	Topics/Policies and billing/New Billing Profile screen	Insufficient funds fee options	Y	UI reference	Claims & Incidents; Workflow	is generated, must be paid, is automatically generated, is split evenly, is overpaid, is used, is sent, is subtracted, is created, is adjusted, is canceled, are temporarily paused, can be collected, is charged, is bound, is billed, are displayed, is rounded, is selected, is reinstated	done	typo: if you want use the cost excluding any taxes and fees
Select when reinstate fees will be charged	N/A	81	New fields	Reinstatement Fees	New Billing Profile screen	Topics/Policies and billing/New Billing Profile screen	Reinstatement fee options	Y	UI reference	Claims & Incidents; Workflow	is generated, must be paid, is automatically generated, is split evenly, is overpaid, is used, is sent, is subtracted, is created, is adjusted, is canceled, are temporarily paused, can be collected, is charged, is bound, is billed, are displayed, is rounded, is selected, is reinstated	done	
Use variables in scripting of rating formula column definitions	Create a shared rating formula variable	83	New buttons	"rating calculation"	Managing rating program calculations	Topics/Policies and billing/Managing rating program calculations	Add task	N	Task	Workflow; Policies & Programs	can be customized.	None found	"Rating Formula Column screen" in Release notes and "Rating Formula Columns screen" in Help Center; not a full screenshot
Use variables in scripting of rating formula column definitions	Create a shared rating formula variable	83	New buttons	"rating formula"; "rating calculation"	Rating program calculation fields screen	Topics/Policies and billing/Rating Program Calculation Field screen	Calculation options	Y	UI reference	Policies & Programs; Forms, Fields, Data Entry Events; Claims & Incidents; Workflow	is replaced; is added; is selected; can be customized; is calculated; is reported; is included	perform	"Rating Formula Column screen" in Release notes and "Rating Formula Columns screen" in Help Center
Use variables in scripting of rating formula column definitions	Refer to a rating formula variable	83	New buttons	"rating formula"; "rating calculation"	Rating program calculation fields screen	Topics/Policies and billing/Rating Program Calculation Field screen	Script options	Y	UI reference	Policies & Programs; Forms, Fields, Data Entry Events; Claims & Incidents; Workflow	is replaced; is added; is selected; can be customized; is calculated; is reported; is included	perform	"Rating Formula Column screen" in Release notes and "Rating Formula Columns screen" in Help Center
Endorse bound renewals when binding an endorsement	To allow users to endorse bound renewals when binding an endorsement	84	New fields	"new rating program"	New Rating Program screen	Topics/Policies and billing/New Rating Program screen	Update screenshot if incorrect; Rating program options	Y	UI reference	Workflow; Policies & Programs; Forms, Fields, Data Entry Events; Users	is used; is displayed; is generated; are cleared; are selected; can be assigned; is locked; are endorsed; are rated; is issued; are notified; is formatted; can be viewed; are added; is linked; are predifined; is created; is reached; can be customized; is calculated; is reinstated; is bound but not issued; are renewed; is canceled; are applied;	perform, later	

Endorse bound renewals when binding an endorsement	To endorse bound renewals when binding an endorsement	84	New fields	"bound" AND "renewal";	Managing policy renewals	Topics/Policies and billing/Managing policy renewals	Add task	N	Task	Workflow; Policies & Programs	is accepted; is stored; is rejected; is deleted	remove	Task starts with "Navigate to the policy" how; other tasks explain what screen to start from.
Endorse bound renewals when binding an endorsement	To endorse bound renewals when binding an endorsement	84	New fields	"endorsement"	Policy workflows	Topics/Concepts and definitions/Policy workflows	Binding; Other workflows	N	Concept	Workflow; Policies & Programs	is used; are called; is requested; is added; are tracked; is reviewed; is requested and accepted; is not enabled; is submitted; are not required	None found	
Endorse bound renewals when binding an endorsement	To endorse bound renewals when binding an endorsement	84	New fields	"endorsement"	Proposals screen	Topics/Policies and billing/Proposals screen	What you can do on the screen	Y	UI reference	Policies & Programs	is not connected; is created; is not submitted; is completed; is signed; is canceled; was rated	None found	
Select the Tail Adjusted Value easier	n/a	85	Updated fields	"edit rating program", then located "Managing rating programs" page. Under "To edit a rating program," followed link that said "Get detailed information on the available settings"	New Rating Program screen	Topics/Policies and billing/New Rating Program screen	Update screenshot if incorrect; Rating program options	Y	UI reference	Workflow; Policies & Programs; Forms, Fields, Data Entry Events; Users	is used; is displayed; is generated; are cleared; are selected; can be assigned; is locked; are endorsed; are rated; is issued; are notified; is formatted; can be viewed; are added; is linked; are predifined; is created; is reached; can be customized; is calculated; is reinstated; is bound but not issued; are renewed; is canceled; are applied;	perform, later	
Select the Tail Adjusted Value easier	n/a	85	Updated fields	"rating program calculation"	Rating program calculation fields screen	Topics/Policies and billing/Rating Program Calculation Field screen	Calculation options > Tail Adjusted Field Value	Y	UI reference	Policies & Programs; Forms, Fields, Data Entry Events; Claims & Incidents; Workflow	is replaced; is added; is selected; can be customized; is calculated; is reported; is included	perform	
Use the new shared commission workflow	To configure the shared commission percentage	87		"commision threshold"	Adding commission thresholds to commission profiles	Topics/Policies and billing/Adding commission thresholds to commission profiles	Add task	N	Task	Workflow; Policies & Programs	must be configured; is added; can be customized	None found	
Use the new shared commission workflow	To configure the shared commission percentage	87		"commission percentage"	Billing and Commissions screen	Topics/Policies and billing/Billing and Commissions screen	Commission options	Y	UI reference	Workflow; Policies & Programs	are generated; are configured; are changed; can be collected; is waived; is not assigned; are adjusted; are created; is selected; can be customized; are automatically applied; is calculated; is triggered; are billed	None found	
Use the new shared commission workflow	To configure the shared commission percentage	87		"commision profiles"	Managing commission profiles	Topics/Policies and billing/Managing commission profiles	Add task	N	Task	Workflow; Policies & Programs	can be customized;	None found	
Use the new shared commission workflow	To configure the shared commission percentage	87		"commision profiles"	New Commission Profile screen	Topics/Policies and billing/New Commission Profile screen	Shared commision options	Y	UI reference	Policies & Programs	is renewed; can be customized	None found	
Use the new shared commission workflow	To configure the shared commission percentage	87		"commision threshold"	New Commission Threshold screen	Topics/Policies and billing/New Commission Threshold screen	Shared commision options	Y	UI reference	Policies & Programs	is calculated; is selected; is renewed; can be customized	None found	
Use the new shared commission workflow	Sharing commission percentage in a new application	88		"application interview"	Completing application interview forms	Topics/Policies and billing/Completing an application interview form	Add task	N	Task	Workflow; Policies & Programs	can be customized; is submitted; is created; must be assigned	None found	
Use the new shared commission workflow	Sharing commission percentage in a new application	88		"policy admin"	New Proposal screen	Topics/Policies and billing/New Proposal screen	Policy options	Y	UI reference	Policies & Programs	is added; is formatted; is canceled; is covered; can be customized	None found	
Create user assignments and user assignment data entry for any domain	To update the relevant permissions	89		"Users and security"	Managing roles	Topics/Administration/User security/Managing roles	Add task	Y	Task	Workflow; Users;	cannot be edited; is added; is no longer displayed; is no longer used; is no longer needed; ca be customized; is copied	remove	
Create user assignments and user assignment data entry for any domain	To update the relevant permissions	89		"Apply Filter to Area Names"	Permissions Assigned to Role screen	Topics/Administration/User security/Permissions Assigned to Role screen	Update screenshot	Y	UI reference	Users (Admin)	can be customized, is accessed	remove	
Create user assignments and user assignment data entry for any domain	To add the assignment panel as a single grid to any custom form	90		"custom forms"	Creating custom forms	Topics/Administration/Forms and fields/Creating custom forms	Add task	N	Task	Workflow; Forms, Fields, Data Entry Events;	can be customized; is created	remove	The Form Help section should have be where users can find all available attributes for custom forms. May be a candidate for new page.
Create user assignments and user assignment data entry for any domain	To add the assignment panel as a single grid to any custom form	90		"custom forms"	Managing custom forms	Topics/Administration/Forms and fields/Managing custom forms	Add task	N	Task	Workflow; Forms, Fields, Data Entry Events;	is inherited; can be customized, are grouped	None found	
Create user assignments and user assignment data entry for any domain	To add the assignment panel as a single grid to any custom form	90		"form help"; "Go to XML Syntax Help"; "Help on Forms XML"	No results								
Create user assignments and user assignment data entry for any domain	To create a user assignment data entry event action	90		"data entry events"	Creating data entry events	Topics/Administration/Forms and fields/Creating data entry events	To add an action to a data entry event	N	Task	Workflow; Forms, Fields, Data Entry Events;	is added; is changed; can be customized; is triggered	None found	
Create user assignments and user assignment data entry for any domain	To create a user assignment data entry event action	90		"data entry events"	Data entry events	Topics/Concepts and definitions/Data entry events	Available actions	Y	Concept	Workflow; Forms, Fields, Data Entry Events (Admin); Claims & Incidents	is called; were refired; is fired	None found	
Create user assignments and user assignment data entry for any domain	To create a user assignment data entry event action	90		"actions triggered by event"	New Action screen (DEE)	Topics/Administration/Forms and fields/New Action screen (DEE)	Action options	Y	UI reference	Forms, Fields, Data Entry Events; Users; Workflow	to be triggered; is assigned; can be customized; to be completed; is created; is modified; is triggered	None found	
Create user assignments and user assignment data entry for any domain	To create a user assignment data entry event action	90		"data entry event"	New Data Entry Event screens	Topics/Administration/Forms and fields/New Data Entry Event screen	Data entry event options; Notification trigger options	Y	UI reference	Forms, Fields, Data Entry Events (Admin); Users (Admin)	is added; is selected; to be triggered; can be customized;	set up	
Define a tag for user assignment schedules	n/a	91	New fields	"new schedule"	Create new schedule screen	Topics/Reporting and analytics/Dashboards/Create new schedule screen	Scheduling options	Y	UI reference	Dashboards; Workflow; People	can be customized; is selected; is displayed; was received	None found	
Define a tag for user assignment schedules	n/a	91	New fields	"access schedules"	No results		Proposed new topic: Managing user assignments/user assignment schedules; Creating user assignment/User assignment schedules; Proposed placement: Topics/Administration/User security						
Configure the user assignment status description	n/a	92		"user assignment"; "user assignments"; "new setting"; "setting name"	No results		Proposed new topic: Managing user assignments/user assignment schedules; Creating user assignment/User assignment schedules; Proposed placement: Topics/Administration/User security						

Create different review workflows and configurations by domain	n/a	92	"review assignment"; "new setting"; "setting list"; "setting name"	No results		Proposed new topic: Managing user assignments/user assignment schedules; Creating user assignment/User assignment schedules; Proposed placement: Topics/Administration/User security