TriLine GRC

TriLine GRC V2.1.0 – New Features

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Note: Some terminology may vary depending on your Configuration settings.

Interface Changes

Logout Required

This release has increased security. One of the new items is the inability for a user to be logged in more than once. If a user does not logout using either the menu item or the at the top right corner they will not be able to log back in for 30 minutes.

Managing User Sessions

If a user does not logout correctly and they are unable to log back in ("You are already logged in" error message), a TriLine GRC Administrator can release the user's session from the Maintenance | Manage User Sessions menu.
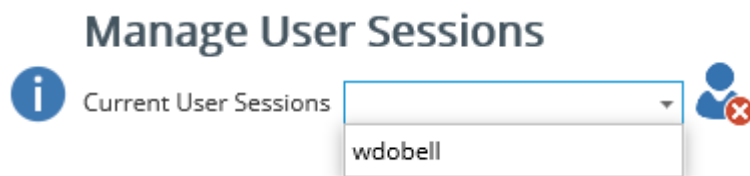
Select the user from the dropdown list then click the delete icon.
Note: The current use will not appear in the list.

Recommendation: Have more than one or create a 'spare' TriLine GRC Administrator position (with 'Do Not Display In Lists' selected) that can be used if the locked user is an Administrator.

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My Tasks becomes My Summary

The default landing page for TriLine GRC has been updated and will now load faster than before.

My Summary

Current Tasks	Roles & Responsibilities	Temporary Allocation	My Reports / Charts

The information on the Current Tasks, Temporary Allocation and My Reports /Charts remain the same.

My Summary

Responsible For	Count
Compliance Process	17
Process Control	25
Risk	7
Risk Treatments	5
KRI	5
Event Type	7
Events	43
Contracts	6
Contract Task	2
Obligations	264
Register Types	5
Registers	15
Repeating Tasks	
Process Control	20
Risk Riview	6
Risk Treatments	7
KRI	9
Contracts	5
Escalation	
Escalation	

A new tab 'Roles & Responsibilities' replaces the previous 'Responsible For' and 'Tasks' tabs.

This tab provides a summary of what the current User is Responsible for and what repeating Tasks they are required to complete.

It now also includes a list of where the current user is the Escalation Point (for Overdue Tasks).

The Count column shows how many of each item apply. For example, in the screen shot to the left the current user is the Owner for 7 Risk records.

To display the relevant data for each row simply click on the text or number and the data will appear to the right of the list.

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Create Register and Create Event

Full height forward and back buttons have been added to the create screens for Registers and Events to simplify moving between the pages of information.

Button click feedback

To improve confirmation that a button click has been processed, a new full-width coloured banner will display at the bottom of the screen.

The banner will be coloured green for a positive result, red for an error, yellow for a warning or blue for information.

Error messages will also be displayed on screen as they are currently.

New options when exporting to MS Excel

When exporting to MS Excel there are now two options: Standard export and With Filters.

Standard export is the same as you experience currently.

With filters has the spreadsheet ready for data filtering.

Number	Title	Description	Category	Consequences	Responsible Officer	Business Unit
ABC88888	This is for Regulatory Compliance.	We have to do these regulatory things to make sure we keep our license.	Board Policy	Insignificant	GM- HR & Marketing	Board of Directors
ACC0005	Prudential Return	The Prudential Return that the company is required to submit.	Legislative	Moderate	General Manager	Finance

| Number	Title	Description	Category	Consequences	Responsible Officer	Business Unit
ABC88888	This is for Regulatory Compliance.	We have to do these regulatory things to mak	Board Policy	Insignificant	GM- HR & Marketing	Board of Directors
ACC0005	Prudential Return	The Prudential Return that the company is re	Legislative	Moderate	General Manager	Finance

Please Note: When exporting With Filters, MS Excel does not wrap text in cells.

TriLine GRC V2.1.0 – New Features

Help menu location

The Help menu has been moved from the main menu to the top banner. The functionality remains the same.
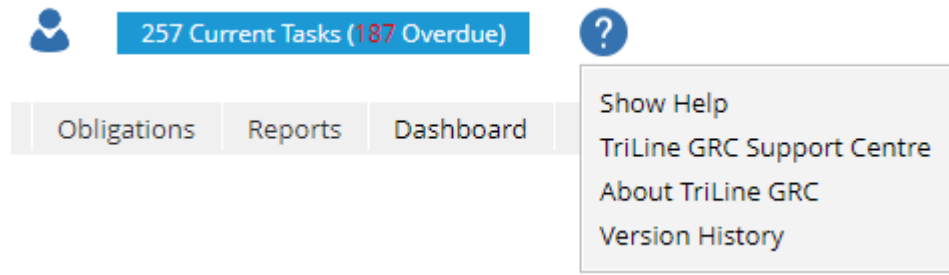
New Saved Layouts

Register List

The Register List now allows saving Layouts for each Register Type.

Register AdHoc Query / Register History Adhoc Query
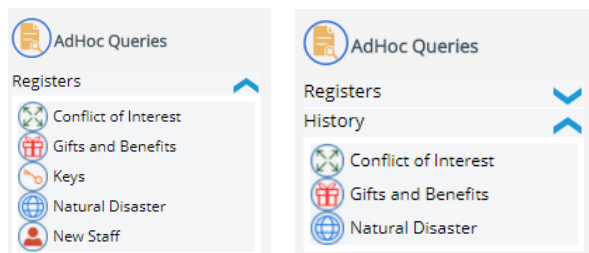
For these items, you select the Register Type from the menu (rather than on the AdHoc Query screen).

Once the AdHoc Query screen appears the Saved Layout options will be available.

Events with Form Fields

Select the Event Type from the menu (rather than on the AdHoc Query screen).

Once the AdHoc Query screen appears the Saved Layout options will be available.

TriLine GRC

TriLine GRC V2.1.0 – New Features

Grids 'contained' within the available screen

Where a grid could extend beyond the existing screen edge with the addition of extra columns the horizontal and vertical scrolling is now within the bounds of your screen for better access to menus and other features.

For the Event List and AdHoc Query screens where all records are displayed, the height of the grid will use all available vertical screen space.

TriLine GRC

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Linked KRI's moved from Assessment to Links tab on Risk

The Linked KRI's tab has been moved from the Assessment tab to the Links tab.

Configuration Page

The Configuration page has been updated to simplify changes.

Click anywhere on the section header (e.g. Tasks) to display the items within that section.

The Maintenance Tab has been moved to the Data Retention section on the General tab.

TriLine GRC

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Password Strength indicator on Login Page

It is now possible to optionally include a Password Strength indicator on the Login page. The indicator does not impede the login process but is a visual reminder to the user of whether their password is strong or weak.

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Compliance Process Tasks retitled

To avoid confusion with the introduction of the Control Inventory module these tasks will no longer appear as a Type of 'Control Task' on the My Summary | Current Tasks tab or in emails. They will now appear as a Type of 'Compliance Task'.

My Summary | Ima Beancounter, GM - Finance & Administration |

| Current Tasks | Roles & Responsibilities | Temporary Allocation | My Reports / Charts |

Page 2 of 3 (26 items)   ◁ 1 **2** 3 ▷   Page size: 10

Enter text to search...

	Type	Number	Details	Due	
	Compliance Task	CRM0025	Corporate Risk Insurance in place (a) The Credit Union ensures that appropriate cover and level of insurance is in place.	28/04/2017	🖊

**** DO NOT reply to this email ****

Hello Fred McCubbin,

The following are overdue for completion by you:

Login ...

Reference	Task	Due	Position
Compliance Task CRM0085 Compliance with "no advice" rule	(b) The Operations Exec Officer must ensure that members requesting RSA advice must be referred to Financial Advisory Services.	30/06/2017	Operations Manager

Risk Rating Map

The Compliance Risk Rating Map, Inherent Risk Rating Map and Residual Risk Rating Map now include a date at the bottom of the downloaded / copied image and on mouseover, displays a list of the records behind each value.

Residual Risk Rating Map

Consequences

Likelihood	Insignificant	Minor	Moderate	Major	Catastrophic
Almost Certain	High · 1	High · 1	Extreme	Extreme	
Likely	Moderate	High · 1	High · 1	Extreme · 2	ABC.4444 Staff Risk RSK0005 Natural Disasters
Possible	Moderate	Moderate	High · 5	High	
Unlikely	Low	Low · 1	Moderate	High · 1	High · 1
Rare	Low · 7	Low	Moderate	High	High

30/10/2017

TriLine GRC V2.1.0 – New Features

AdHoc Queries, Reports and Charts

Report output format

Reports can now be exported in DOCX format.
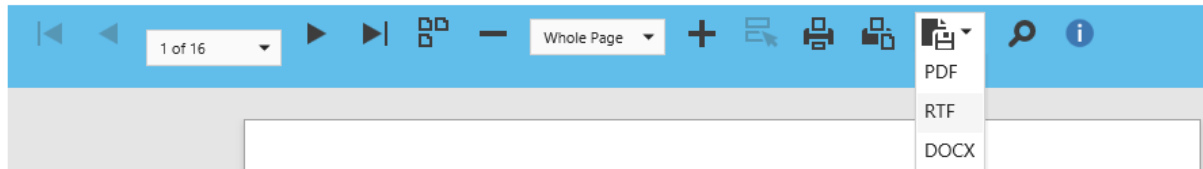
Reminder Date / Days in Adhoc Queries

The Reminder Date and Reminder Days have been added to the Process Controls, Risk (for Risk Review), Risk Treatment and Contract Task AdHoc Query screens.

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Residual Risk Rating by Risk Chart

A new chart will be available showing the Residual Risk Rating by Risk.
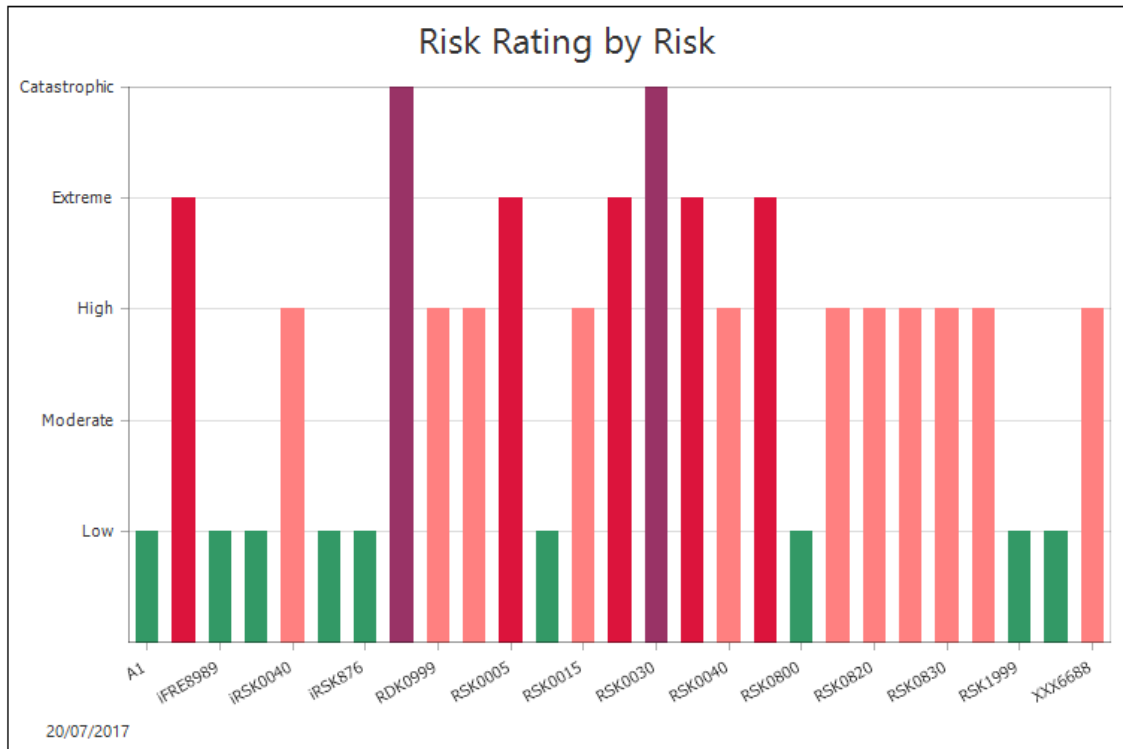
The available filters and options for the chart are:

1. Business Unit
2. Risk Category
3. Risk Sub Category
4. Risk Owner
5. Tags
6. Inactive records.

TriLine GRC

TriLine GRC V2.1.0 – New Features

KRI by Trend Chart

A new chart will be available showing KRI's by Trend.

KRI By Trend / Rating
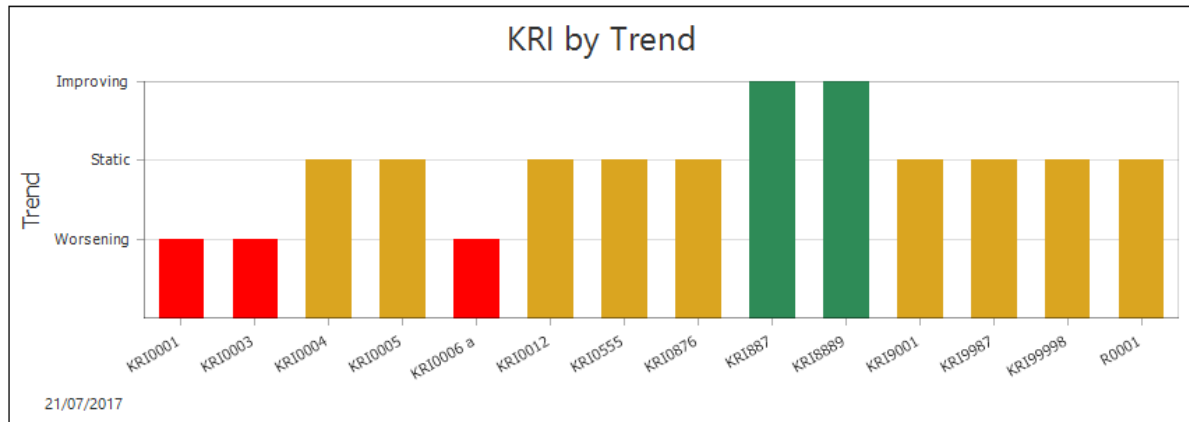
The available filters for the chart are:

1. Risk Category
2. Trend
3. Rating
4. Owner
5. Tags

KRI by Rating Chart

A new chart will be available showing KRI's by Rating

KRI By Trend / Rating
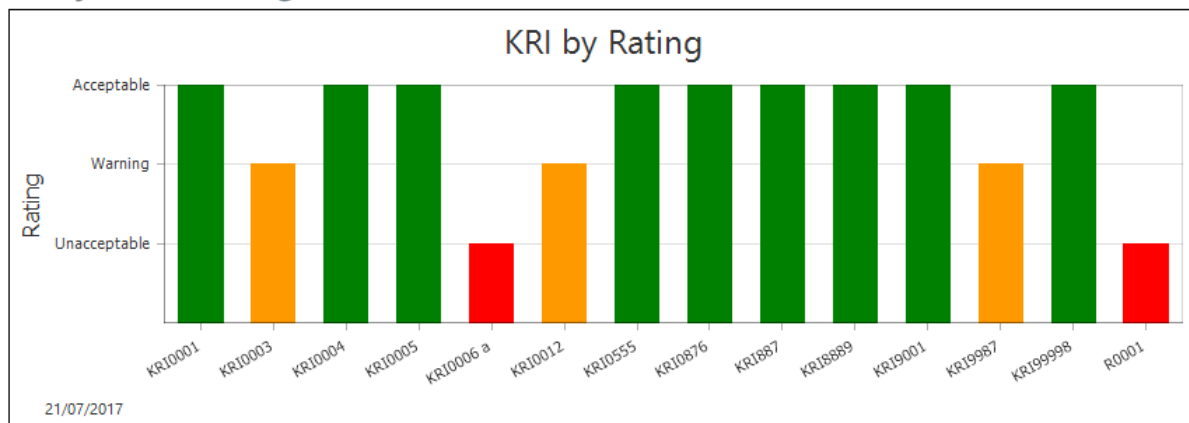
The available filters for the chart are:

1. Risk Category
2. Trend
3. Rating
4. Owner
5. Tags

TriLine GRC

TriLine GRC V2.1.0 – New Features

Taxonomy Report

This creates a spreadsheet with the 'Taxonomy' of your system. For each module it lists Categories, Custom Fields, Status values etc. on a separate tab.

Linked Obligations as filters on Process Control reports

Obligations linked to a Process Control can now be used as a filter in the Compliance Controls reports. Obligations or Sub Obligations must be linked to a Process Control to be included. Only Obligation records will be included in the selection list but the resulting report will include Sub Obligations.

Triline GRC

TriLine GRC V2.1.0 – New Features

Report File Name

When you use the Report Export function the generated filename will be the same as the report Title.

Compliance Process Reports
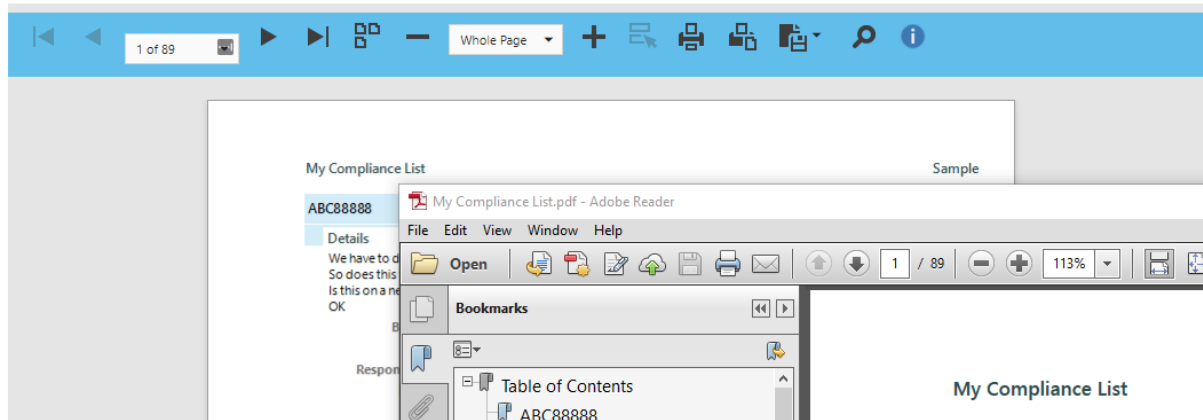
TriLine GRC

Events and Registers
New field type 'Display Text' for Events and Registers

This new field type will allow for free-form text to be displayed in the form.

TriLine GRC V2.1.0 – New Features

Mandatory attachments for Events and Register Tasks

New Task

[ ] Blind Task   [ ] Critical Task   [ ] An Attachment is mandatory for Task Completion

For each Task created for an Event or Register record an attachment can be mandatory.

Register Title field re-purposed

With this release, you can change the field name for the Title field to be relative to the Register purpose (**Note:** It remains a text field of 300 character).

Edit New Staff

| Details | Default Security | New Record Help |

Name: New Staff
Prefix: NS
Title Field Name: Position
Title Prompt: Enter the Position being filled
Portal: [✓] Show in Portal
Auto Alerts: [✓] Send an automatic alert to Register Owners on new entry
Status Change: [ ] Send an automatic alert to the creator on change of Status
This Register is: [✓] Active
Icon: Icon 11
Register Designers: Company Secretary   Click here to select Designers

The field name will be used on all screens.

New Staff Register

| Page 1 of 1 (15 items)   ‹ 1 › | | Page size: 20 ▼ |

Enter text to search...

Drag a column header here to group by that column

Number	Position	Register Status
NS000048	Compliance Manager	Being Managed

New Event and Register numbers

New Event and Register records will be numbered sequentially within their respective Type.

TriLine GRC V2.1.0 – New Features

Fast Add Note or Attachment

The Event and Register List screens now include buttons to add a Note or Attachment from the List screen (without having to open the record).

Note: For the 'Registers List' you will need to Reset the Grid to display the column in the correct location.

Import Events

With this release you will be able to bulk import Event history. The URL for this will be https://yoursite/importEventRecords.aspx (e.g. https://host-au.triline-grc.net/abc1234/importEventRecords.aspx).

A spreadsheet template will be created for the selected Type with the basic fields, any Custom fields and the form fields for the Type.

TriLine GRC V2.1.0 – New Features

Portal Changes

Merged Portal

With this release, we have merged the Event and Register portals into a single entry point. The URL for the portal will be https://yoursite/portal.aspx (e.g. https://host-au.triline-grc.net/abc1234/portal.aspx).

The Password Challenge will no longer be available however the Captcha option is still available.

Portal Registration

To increase the security around Portal access, all users will have to be registered – except for existing TriLine GRC Positions. Users can self-register, be added in the Security Centre as 'Portal Only' users or bulk loaded via a spreadsheet. Self-registration can be automatic or require approval by a TriLine GRC Administrator. An email address is required for self-registration and will be limited by the Domain Name from the person's email address.

Portal History

Portal History for the current user will be available by clicking the History button on the Portal screen.
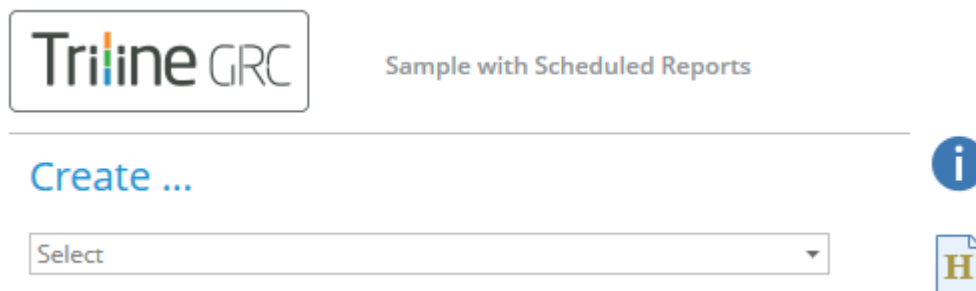
The History is displayed in a popup window and will include Events and Registers.
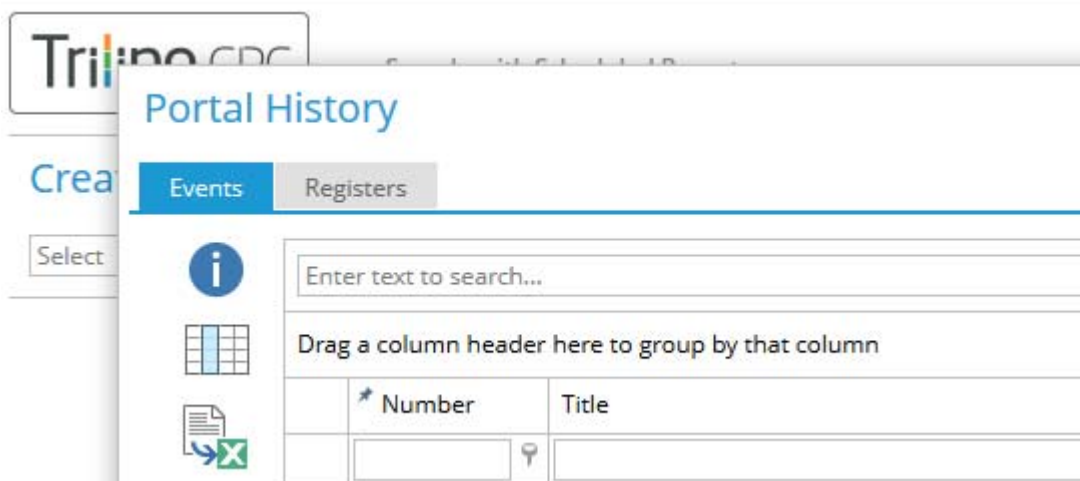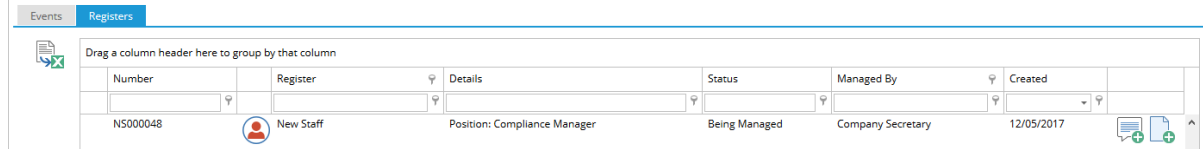
TriLine GRC V2.1.0 – New Features

Fast Add Note or Attachment

For each Event and Register record displayed in the Portal History there are two new buttons to allow a Note or an Attachment to be added to the record.
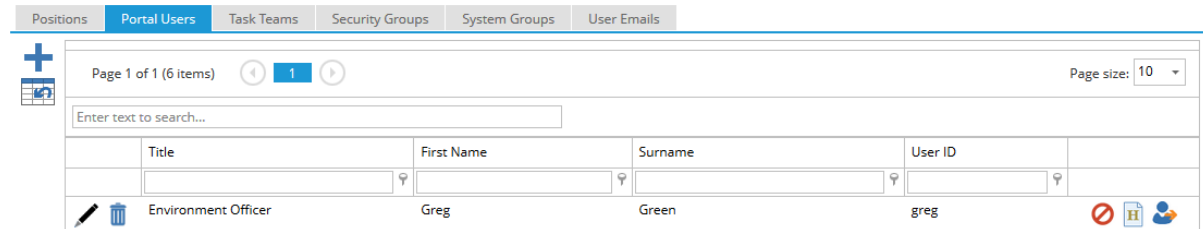
The designated Manager of the Event or Register will be notified by email that a new Note or Attachment has been added.

Security Centre

Registered Portal Users will appear in the Security Centre on a separate tab.
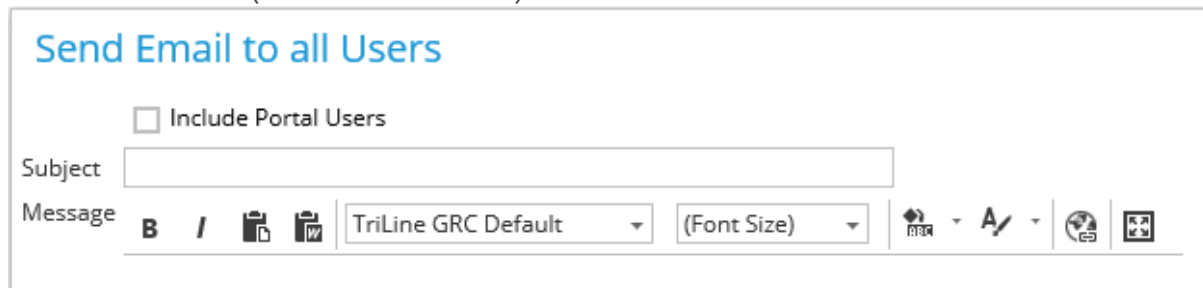
Features:

1. Add a new Portal User individually or via spreadsheet
2. Update the Portal User details
3. Approve or Block Portal access
4. Display the Portal Usage History for the User
5. Convert the Portal User to a TriLine GRC User.

Portal Users included in 'Send Email to all Users'

The option to send an email to all Users (Maintenance | Send Email to all Users) now has a selection to include Portal Users (with an email address).

Archive Events

To improve the response time on the Events list (if you have a lot of Closed Events) it is now possible to 'Archive' Events. To be Archived an Event must be in your 'Closed' Status. Once archived they won't appear in the Event List even if you select 'Show Closed records'. You must select 'Show Archived records' to display them.

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A new menu item will appear if the User has Edit Rights to any Events.

To be able to Archive an Event the User must have Edit rights to the Event.

For all charts, queries and reports Archived Events will be treated as 'Closed'. For example if you select 'Include Closed records' on the Event List report, any Archived Events will appear in the report if they are within the selected date range.

Events	Registers	Contracts

Work with Events records

Archive Events records

Improved help text for fields

For both Events and Registers the help text displayed has been improved when hovering over the information button for a field. The information will include the 'Description' defined for the field, valid field values and whether the field is required.

Gifts and Benefits

Click here for more information

Step 1 of 3

Title:* Enter a short Title (up to 300 characters)

Date Received or Offered:*

Offered To:*

Information: In the **Donor** field provide the name and address of the person o

This field …

Date the gift or benefit was received or offered

Accepts: a date

* Required Field

Triline GRC

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Limit who can create a new Register or Event record

You can now limit who can create individual Register or Event records by selecting a Task Team. Only Members of the Task Team will see the Type on the new menu.
Normal security will apply to the created record.
If the Register or Event record is available in the Portal then the limitation will not apply in either TriLine GRC or the Portal.

Edit Events Type

Type Name: Staff Exit

Prefix: SE

Not in Portal: ☐

Limit by Task Team: Select Task Team (Optional)

Active: ☑

Anonymous Reporter: ☐

Edit New Staff

Details | Default Security | New Record Help

Name: New Staff

Prefix: NS

Title Field Name: Position

Title Prompt: Enter the Position being filled

Portal: ☑ Show in Portal

Limit by Task Team: Select Task Team (Optional)

Auto Alerts: ☑ Send an automatic alert to Register Owners on new entry

Status Change: ☐ Send an automatic alert to the creator on change of Status

This Register is: ☑ Active

Icon: 👤 Icon 11

Register Designers: Company Secretary   Click here to select Designers

Statistics

Most modules now include one or more Statistics screens.

Process Control Task Statistics
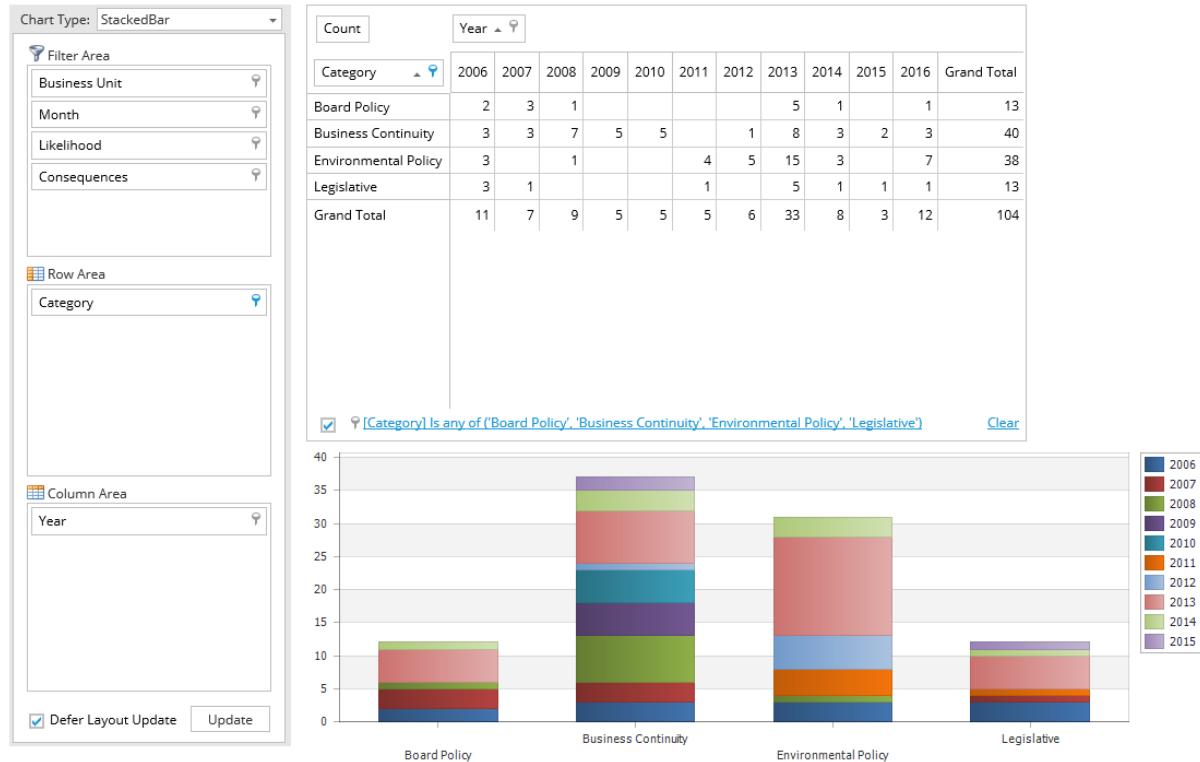
Each screen consists of a pivot grid, a chart and a number of fields that can be used in either the Row or Column areas. The chart is automatically updated with any change to the pivot grid. Data in both the Row and Column areas can be nested.

Count		Category ▲ ⚲	Status ▲ ⚲					
		⚲ Capital Risk		Capital Risk Total	Ⓢ Ethical	⚲ Financial		Financial Total
Residual Risk Rating ▲ ⚲	Risk Score Band ▲ ⚲	Effective	Unacceptable		Effective	Effective	Unacceptable	
Ⓢ Catastrophic	High							
Ⓢ Extreme	High	1	1	2				
	Low					1		
	Moderate						1	1
Extreme Total		1	1	2	1		1	1
Ⓢ High	Low	2		2	1	1		1
Ⓢ Low	Low	1		1		1		1
Ⓢ Moderate	Low	1		1				
Grand Total		5	1	6	2	2	1	3

The pivot grid can be exported to MS Excel as can the underlying data. For example, by clicking on the last figure in the Capital Risk Total column (above) the six Risks that relate are displayed in a grid that can be exported.

TriLine GRC V2.1.0 – New Features

Note: All available columns will be included in the export.

The following screens and fields are available (**Note:** the availability of fields and the field names could vary based on your configuration):

Screen	Fields
Process Control Task	Category
	Year (the year the task was completed)
	Month (the month the task was completed)
	Business Unit
	Likelihood (requires Compliance Risk Rating)
	Consequences (requires Compliance Risk Rating)
Risk	Category
	Residual Risk Rating
	Business Unit
	Risk Score Band
	Risk Appetite
	Risk Status
	Inherent Consequences
	Residual Consequences
	Inherent Likelihood
	Residual Likelihood
	Sub Category
Treatment Task	Category
	Year (the year the task was completed)
	Month (the month the task was completed)
	Business Unit
	Residual Likelihood
	Residual Consequences
	Residual Risk Rating
	Risk Score Band
	Risk Appetite
	Risk Status
	Sub Category
KRI	Risk Category
	Rating

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Screen	Fields
	Trend
Events	Category
	Year (the year the Event occurred)
	Month (the month the Event occurred)
	Type
	Cause
	Category
	Sub Category
Contracts	Business Unit
	Contract Type
	Entity
	Status
Control Inventory	Business Unit
	Type
	Effectiveness

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Maintenance

Bulk loading Positions

A facility has been added to allow multiple Positions to be added via a spreadsheet. Positions can be TriLine GRC Users or Portal Users.

Triline GRC

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Monitor alerts on errors

If an error occurs during any of the Monitor runs (New Tasks, Critical Tasks and Overnight) a log file is written. To ensure you are aware of the problem an email will be sent to the Notification Email address.

These types of error cannot be resolved by your staff so a copy will also be sent to TriLine GRC Support for investigation and resolution.
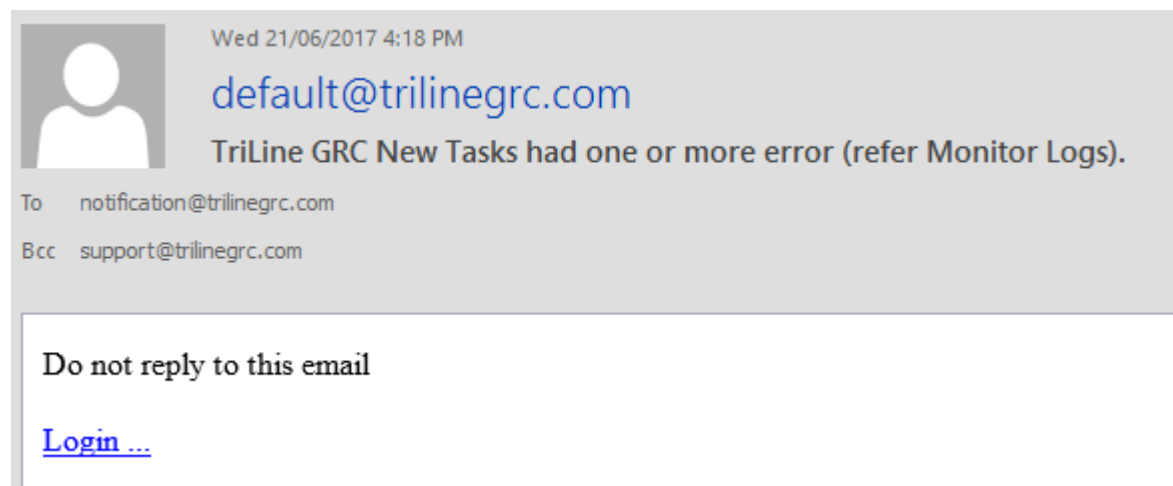
No sensitive information is included in the email.

TriLine GRC V2.1.0 – New Features

Add Notes to Compliance, Risk and KRI records

You can now add Notes to Compliance, Risk and KRI records. The Notes can be (optionally) excluded from list reports.

Compliance Process

CRM0005   Annual Company Returns

| Process Detail | References | Process Controls | Notes | Archives | Links | Custom Fields | Security | History |

Page 1 of 1 (1 items)   1   Page size: 5

	Note
✏ 🗑	Annual returns were delayed due late changes to accounting standards.
	Ima Beancounter 29/05/2017

Compliance Process Reports

Settings

Group By   Group By

Applied Filters & Options

Report Title   Enter your own Report Title (Optional)

Filters & Options

Business Unit   ☐ Include Inactive   List of things
Category   ☐ Each record on new page
Responsible Officer   ☐ Exclude Process Controls
Consequences   ☐ Exclude Links
Likelihood   ☐ Exclude References
Risk Rating   ☐ Exclude Notes
Tags
Reference
Sub Reference

TriLine GRC V2.1.0 – New Features

Compulsory Note on Risk Assessment change (optional)

You can now configure whether a Note must be added to a Risk if anything on the Assessment tab is changed or Compliance if the Risk Rating is changed.

Configuration

General	Database	Monitor	Maintenance	Risks

Risk Assessment

- ☑ Calculate Inherent Rating Score using Likelihood and Consequences
- ☑ Calculate Residual Rating Score using Likelihood and Consequences
- ☑ Calculate Risk Score as
- ☑ Show Risk Assessment Management and Adequacy of Controls
- ☑ Show Risk Appetite
- ☑ A note must be added on Assessment change

Compliance

Compliance Rating Change: ☐ A note must be added on Compliance Rating change (requires Show Compliance Risk).

When the option is selected and there is a change on the Assessment tab, a compulsory note will need to be entered before the changes are made.

Risk *

Add Assessment Note   ×

B *I* 📋 📋   TriLine GRC Default ▾   (Font Size) ▾   ☰ ☰   🔤 ▾ A/ ▾   ✓

Design	HTML	Preview
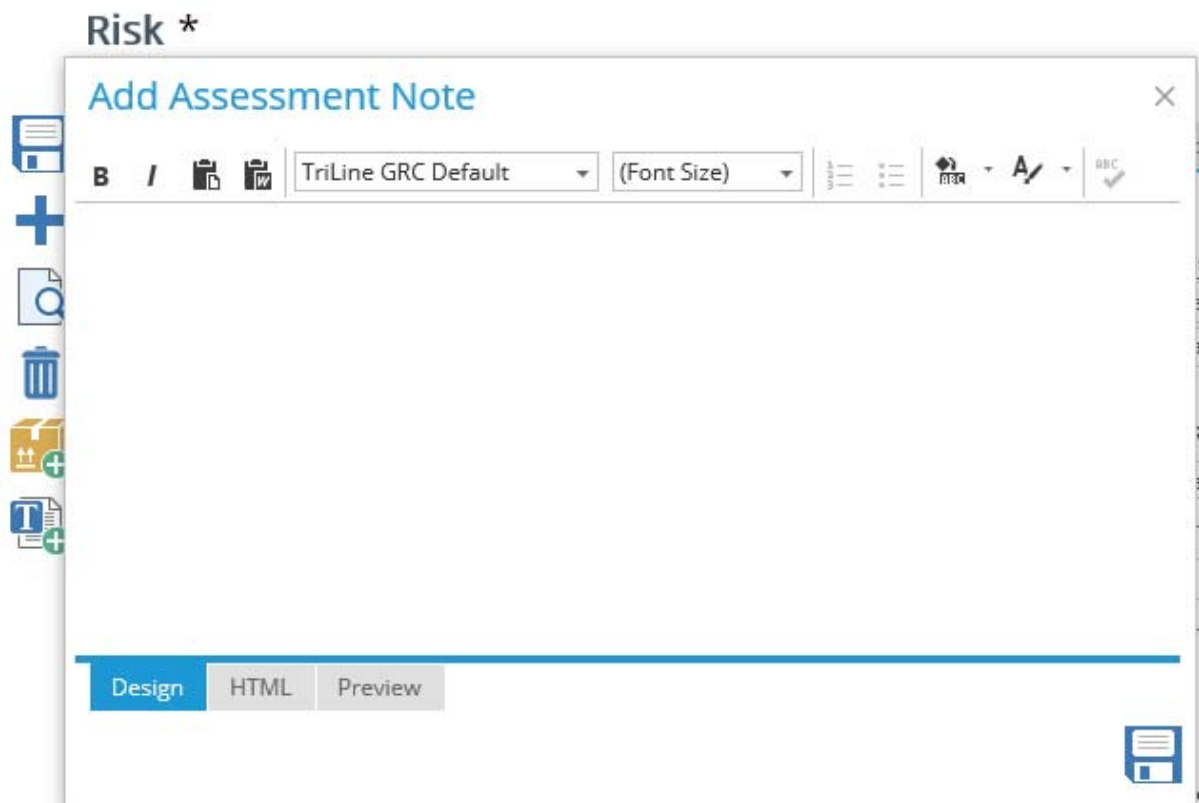
TriLine GRC V2.1.0 – New Features

Risk Score Bands changed from 4 to 5

A 5th Risk Score Band is now available for customer's using Risk Scoring.

Note: This is not an optional setting.

On implementation, the 5th Band will be named 'Band 5' with the current maximum value and colours. The value of the 4th Band will be changed to the current maximum minus 1.

Risk Score Bands		Maximum
■ #008040 ▾	Low	8
■ #FFCC00 ▾	Moderate	15
■ #FF6600 ▾	High	20
■ #FF00FF ▾	Extreme	23
■ #FF0000 ▾	Catastrophic	25

Change History for 'Contract With' records

The history of any changes to a 'Contract With' record will be displayed on a new tab.

Contract With

| Details | Notes | Custom Fields | Contacts | Linked Contracts | History |

Page 1 of 1 (9 items)   ◁ **1** ▷   Page size: 10 ▾

Enter text to search...

Date	Person	Details
12/07/2017	GM - Finance & Administration Ima Beancounter	Contact Added: John Berkhalter

Tasks

Contract Renewal Alert Task

The Contract Renewal Alert has been changed to an optional Task that can be generated prior to the Notice Period date.

Renewal Term	Automatic Rollover	For a further 12 Month/s
Start Date 30/11/2015	Initial End Date 30/11/2016	Notice Period 3 Month/s ☑ Send Reminder
Execution Date 12/11/2015	Current End Date 30/11/2017	Reminder 1st 30 2nd 10 Days before Due Date

In the example above the Reminder Date for the Task would be 31/7/2107 - Current End Date minus the Notice Period (3 Months) minus the 1st Reminder Days (30). Normal Task handling applies to the Task

A new suite of reports has been added for Contract Renewal Tasks (Current, Overdue and Completed).

Contracts	Control Inventory	Obligations

Work with Contract records
Work with 'Contract With' records
Import Contracts from Spreadsheet

Reports — Contracts, Tasks, Renewal Tasks

Charts — Contracts

A default value can be defined for the 1st Reminder Days in the Configuration.

Configuration

General	Database	Monitor	Risks & KRI's	Events	Obligations	Customisation	Portal

∨ General

∨ Data Retention

∨ Interface

∨ Tasks

∨ Compliance

∧ Contracts

First Reminder Days: 30 Default 1st Reminder Days for Renewal Tasks

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Task Due Date change history

The Task Due Date history is now available for all modules.

Compliance Process Task Due Date Changes

Number	Task Details	Due Date			Actioned By	Completed
		Original	Current	Changed		
CRM0095	IT Security (g) The keypad access code for the server room must be changed every six months in accordance with IT Security Policy.	30/03/2016	12/08/2016	28/07/2017	Company Secretary Arthur Boyd	☐
CRM0065	Induction Process (c) Compliance reports his or her findings to the Board and the Internal Compliance Committee.	8/08/2012	24/05/2016	24/05/2016	Company Secretary Arthur Boyd	☑

The details will be available from the module Reports menu.

The list can be exported to Excel.

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Express Complete One Click

A new configuration item will allow a single click to Express Complete a Task.

On the My Summary page, the mouseover tooltip will vary depending on the configuration setting.

One Click not selected:

The existing confirmation popup will display on click.

One Click selected:

The Task will be 'Express Completed' on click.

TriLine GRC V2.1.0 – New Features

Customise and create Interactive Dashboards

Your interface with the Interactive Dashboards has changed:

All the Interactive Dashboards for each module will be available on one page rather than multiple menu items.

It is also possible for authorised staff (TriLine GRC Administrators and members of a new System Security Group - Dashboard Designers) to modify existing Interactive Dashboards and create new ones in most modules.
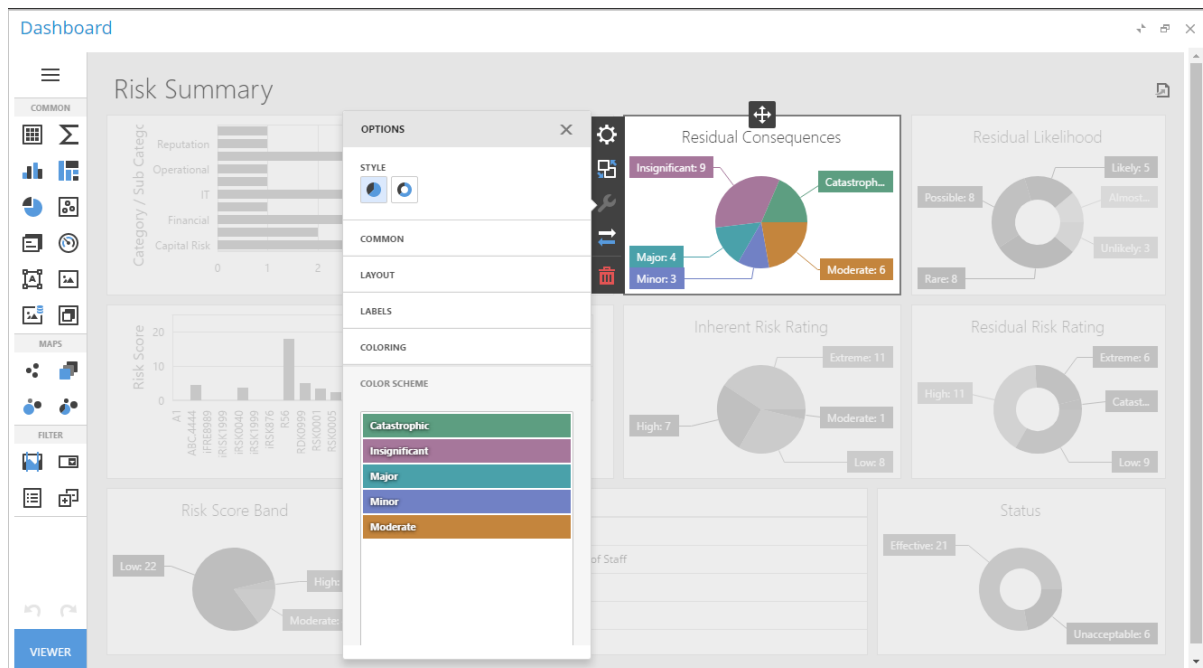
All existing Interactive Dashboards will be available and can be modified as required.

TriLine GRC V2.1.0 – New Features

Data Sources

Initially we provide a number of 'Data Sources' to match the existing suite of Interactive Dashboards. If your creative flair requires data in a layout / format we don't provide by default then you can contact us and we will attempt to meet your needs.

Getting Started

Previously each Interactive Dashboard was customised to your configuration as it was loaded (e.g. Risk Rating colours). We are unable to do that with this new version. You will need to customise each of the Dashboards to meet your specific configuration (e.g. set colours for Risk Rating). This is a one-off exercise. Using the Dashboard Designer is documented in the TriLine GRC Help.

Note: By defining your own colours in the Dashboard, when the Dashboard is exported the colours will appear in the output.

Create a Home Screen icon on your mobile device

You can now create a Home Screen icon on your mobile device for your TriLine GRC site.

Follow the instructions for your particular device.

TriLine GRC

TriLine GRC V2.1.0 – New Features

Control Inventory

The Control Inventory provides a mechanism for TriLine GRC customers to measure the 'Effectiveness of Controls'. It is not envisaged that there will be a one-to-one relationship to a Process Control or Treatment but rather a 'super-set' or 'aggregation' of a number of related items (e.g. Compliance Processes, Process Controls, Risk, Treatments, KRI's etc.). A Task generated from the Control Inventory is only to record the current Control Effectiveness.

For example: Segregation of Duties in Loans Area

> The Control has a corporate Policy.
> Annual Policy review Task (Process Control)
> Hindsight Review (KRI)
> The Policy is in the Document Module and every time it is reviewed each staff member has to sign off that they have read the Policy.
> An Event to report incidents.
> Listed as a key control in one or more risks.
> The person completing the Task would review all of the above and then record the Effectiveness.

TriLine GRC V2.1.0 – New Features

(Control Inventory)

CI0005 ◄ ► Staff - Remuneration

| Details | Custom Fields | **Links** | Tasks | Notes | Archives | Security | History |

| **Compliance** | Risk | KRI | Contract | Documents |

Page 1 of 1 (1 items) ◄ 1 ► Page size: 5 ▼

Enter text to search...

	Number	Process	Status
🔗	COM0024	Staff Remuneration	Active

(Control Inventory)

CI0005 ◄ ► Staff - Remuneration

| Details | Custom Fields | **Links** | Tasks | Notes | Archives | Security | History |

| Compliance | **Risk** | KRI | Contract | Documents |

Page 1 of 1 (3 items) ◄ 1 ► Page size: 5 ▼

Enter text to search...

	Risk Number	Risk	Status	
🔗	RSK0903	Staff Payroll	Active	
🔗	RSK0904	People - right person, right job, risk skills, right time	Active	
🔗	RSK0906	Pay and Conditions	Active	H

(Control Inventory)

CI0005 ◄ ► Staff - Remuneration

| Details | Custom Fields | **Links** | Tasks | Notes | Archives | Security | History |

| Compliance | Risk | **KRI** | Contract | Documents |

Page 1 of 1 (2 items) ◄ 1 ► Page size: 5 ▼

Enter text to search...

	Number	Title	Current	Trend	Rating	
🔗	KRI0016	Staff Satisfaction Rating	0	■ Stable	● 1 Acceptable	
🔗	KRI009	Key Staff Lost	0	■ Stable	● 1 Acceptable	

TriLine GRC

TriLine GRC V2.1.0 – New Features

Document Library Module

The Document Library Module is an optional module that provides the following:

1. A repository of documents that can be viewed on-line by all staff (via the TriLine GRC Portal or within TriLine GRC) not just TriLine GRC users.
2. The ability to upload documents and allocate a Category (e.g. Human Resources, Customer Complaints etc.) and a Type (e.g. Policy, Procedure, Form etc.).
3. A Document Review cycle can be initiated from within TriLine GRC.
4. Capture metadata about the document (e.g. Version, Summary).
5. Create an archive of Document versions with accompanying change summary.
6. Link a Document to other Documents (e.g. Form to Procedure) and records in other TriLine GRC modules (e.g. Risk).
7. Create a 'Read and Certify' Task for Documents where a new version must be read by all staff (linked by TriLine GRC Security).
8. Documents can be downloaded (configurable by Document).
9. Track who has viewed and downloaded the document.

The Document Module is not intended to be the primary repository for customer documents. It is strongly recommended that only the 'published' version of any document be available (e.g. PDF format).

TriLine GRC V2.1.0 – New Features

The document can be viewed on screen and downloaded if required.

Effective Date

As you go through the review cycle of a document you will be able to upload a new version of the document that will be 'Effective' from a date in the future.

The TriLine GRC Portal and TriLine GRC Document will always display the 'current' version of the document with an indication of when the document will be superseded.

If the Document record is displayed the 'new' version will be displayed by default with the option to display the 'current' version.

TriLine GRC

TriLine GRC V2.1.0 – New Features

Things to do before you upgrade

1. If you require a default of more than the 30 days on contract reminder renewals, please inform TriLine GRC before the upgrade.
2. Have a list of valid Domain Names for people using the TriLine GRC portal ready for entry.
3. Advise all staff using the TriLine GRC portal that they will need to register before they can access the upgraded portal.
   To register they will need to enter their details including an email address and an activation or approval required email will be sent to their address.
   Alternatively, once the site is upgraded, the list of users can be added via a spreadsheet and an invitation email can be sent.
4. Advise staff of changes to Task completion if Express Complete One Click is to be used.

Things to do after your upgrade

1. **Important:** Advise your staff to use the Logout menu item or click the red in the top right corner of the page otherwise they may not be able to log back in for 30 minutes.
2. **Important:** If you only have one TriLine GRC Administrator position create a 'spare' (with 'Do Not Display In Lists' selected) in case the Administrator position is locked out due by failing or being unable to logout correctly.
3. If you are using a password challenge and Captcha for your existing portals you will need to reset the values on the Maintenance | Configuration page. **Note:** The password challenge is no longer available.
4. Advise your staff of the change from My Tasks to My Summary.
5. Update any existing URL's you may have created to the Events or Register portals on your intranet or desktops to the new single portal URL (https://yoursite/portal.aspx).
6. Enter the valid Domain Names for TriLine GRC portal access.
7. Modify each of the Interactive Dashboards to your configuration. This could include: setting the colours (e.g. Risk Rating, Risk Score, KRI Trend and KRI Rating), removing unwanted items (e.g. if not using Risk Scoring) and terminology (e.g. Event).
8. If Risk Scoring is used, then set the Risk Score Bands for the five bands (previously four).
9. Set the Password Strength indicator if required.