TriLine GRC V2.3.0 — New Features

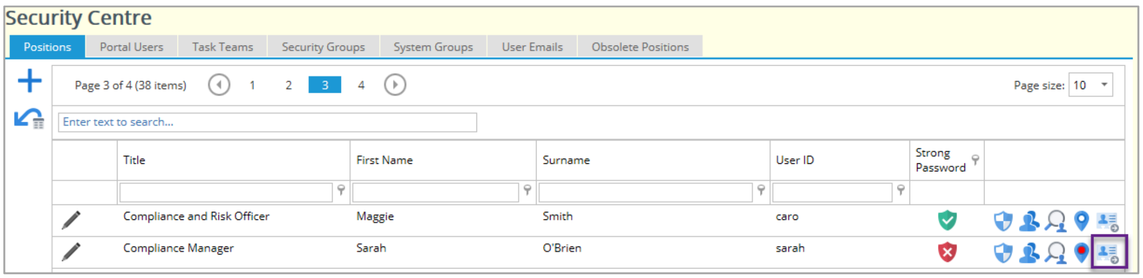
Note: Some terminology may vary depending on your Configuration settings.

Positions

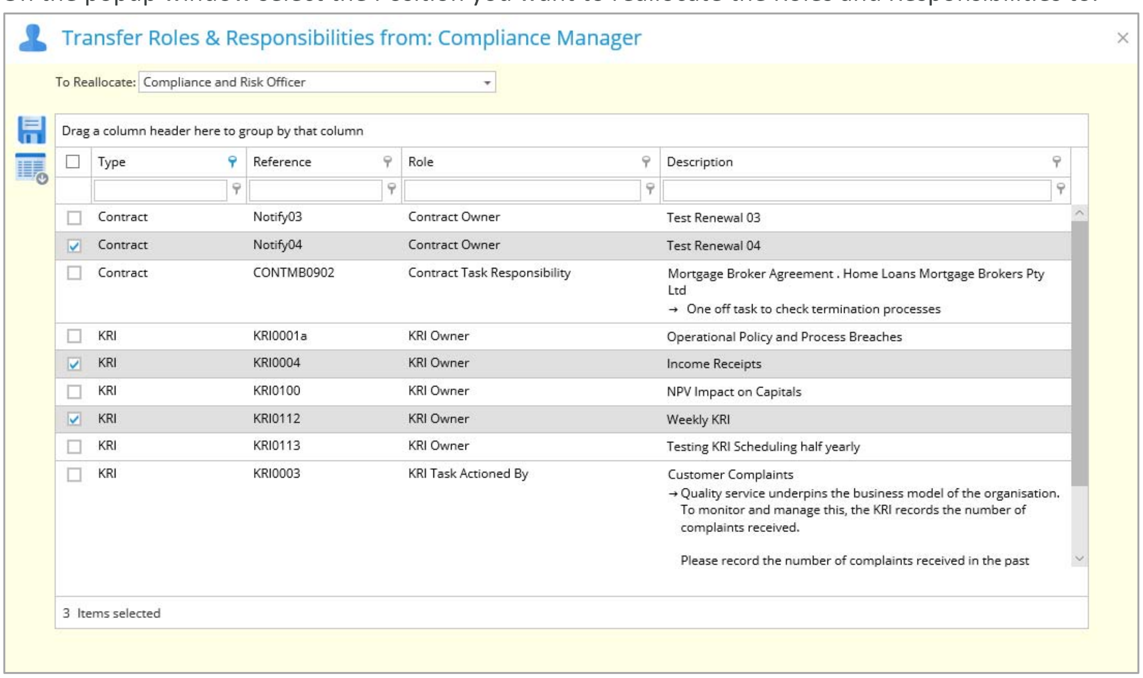
Bulk transfer of Roles and Responsibilities

When staff leave or change Positions it will be necessary to transfer some or all their Roles and Responsibilities to one or more other Position. It is now possible to transfer these, across all modules, in one process.

On the Security Centre page click on the 'Transfer Roles & Responsibilities' icon for the Position that has the Roles and Responsibilities to be reallocated.



On the popup window select the Position you want to reallocate the Roles and Responsibilities to.



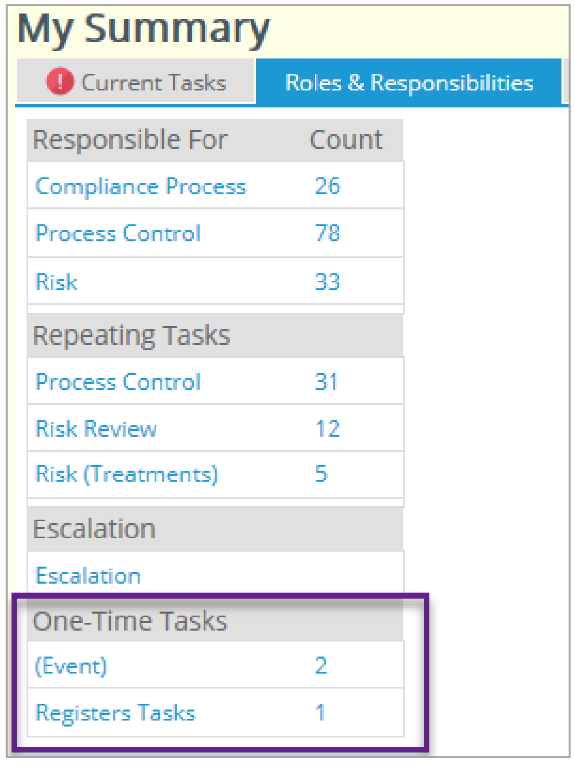
Select the required items and then click on the Save icon.

Please Note: If a Position already has the same Role or Responsibility (e.g. also the owner of a Risk or is a Task Actioned By) the record will not be listed. Task Team Membership, Security Group Membership and tasks allocated via Task Team Membership will be listed on the popup window but cannot be modified.

Future one-time tasks

A future one-time task is an Event or Register Task where the email notification has not already been sent. These will now be displayed on the My Summary Roles & Responsibilities tab, the Show Usage popup and the Future Schedule.

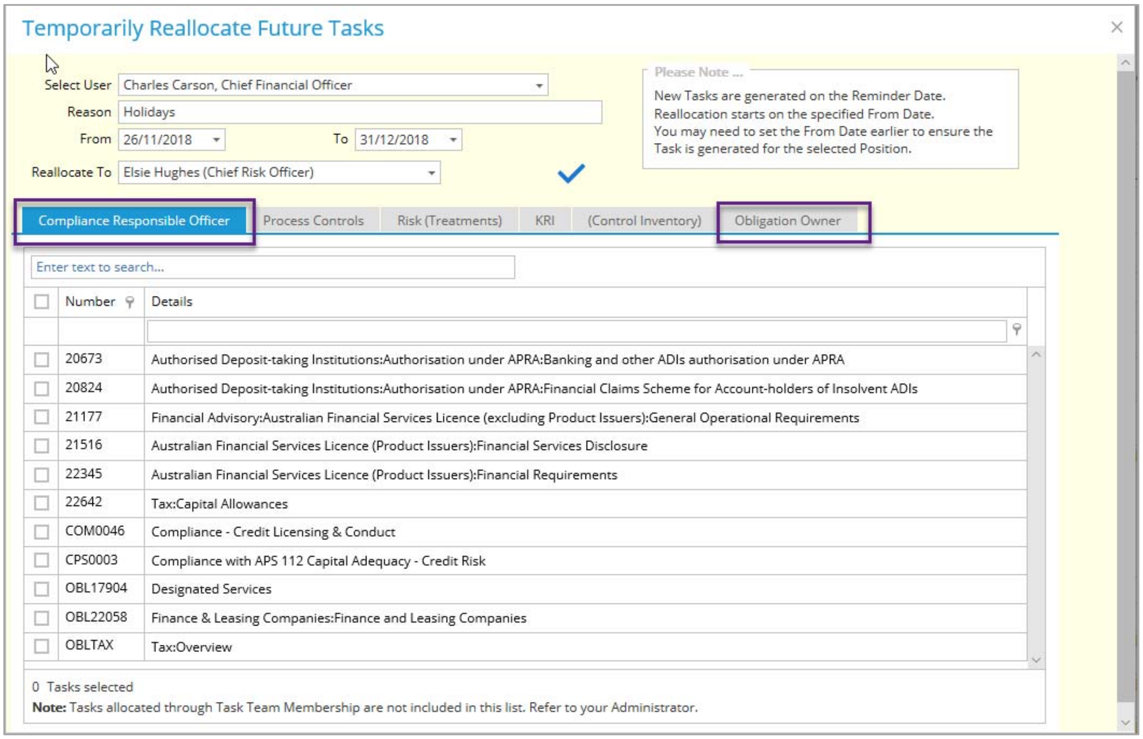
Please Note: This does not include Adhoc tasks.



Obligations

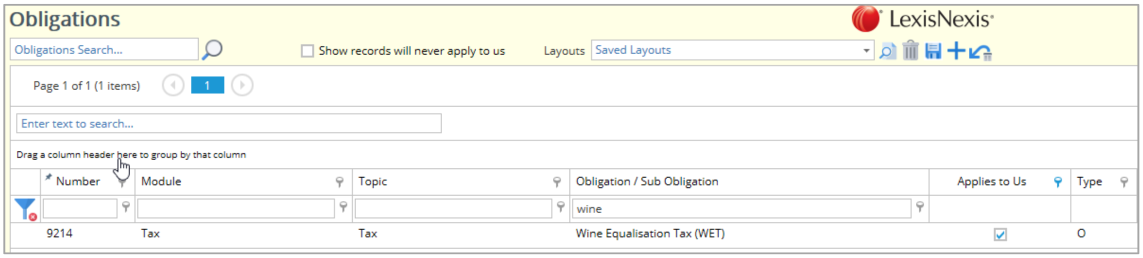
Temporary reallocation of Compliance Responsible Officer and Obligation Owner

To ensure notifications and alerts are sent from the Obligations module it is now possible to temporarily reallocate the Compliance Responsible Officer and Obligation Owner roles.

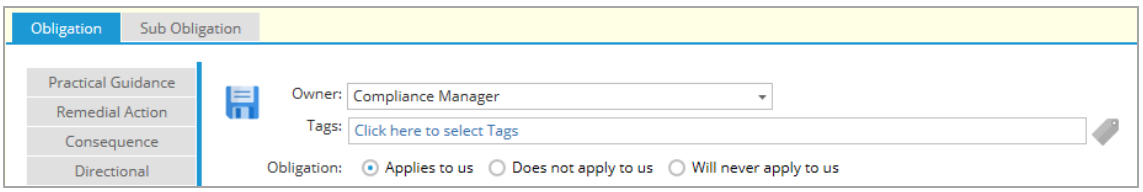


Will never apply to us

There may be some situations where an Obligation is not applicable to your organisation and will never be applicable. For example, in Australia, the Wine Equalisation Tax is included in the Australian Tax Module but only applies to wine producers.

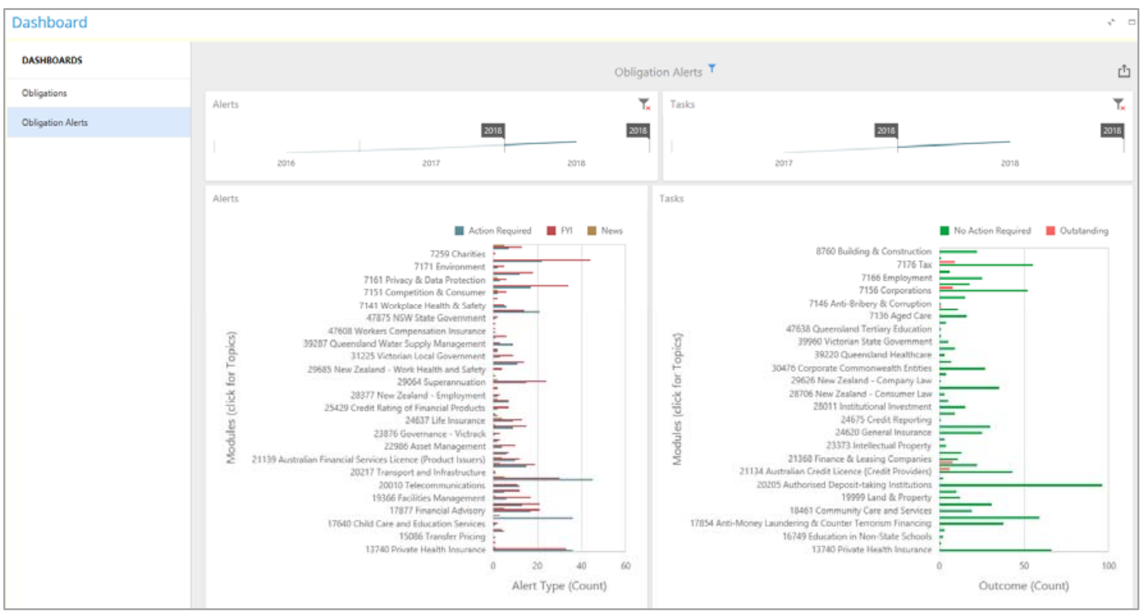


This new feature will allow you to mark an Obligation as 'Will never apply to us'. If selected, the data will be kept up-to-date but no alerts or notifications will be sent.



Alert Dashboard

A new interactive Dashboard has been added to show Alerts and Tasks.



Export Sub Obligation list

It is now possible to export the list of Sub Obligations from the Obligations page.

Compliance

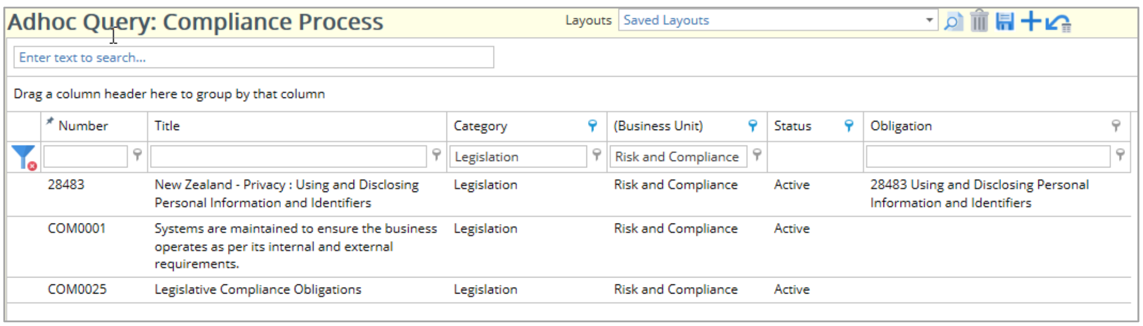
Export / Import Compliance data

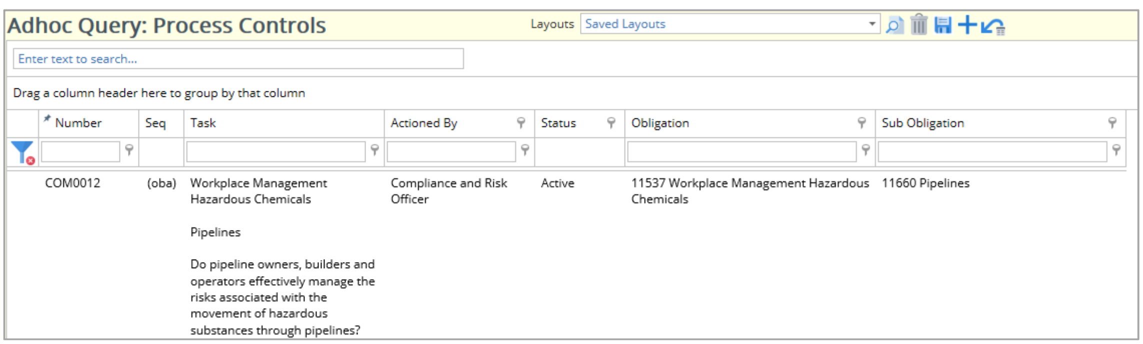
Source Obligation designation has been included in the export of Compliance data.

When the data is imported, the Source Obligation link will be created if the selected Obligation is available.

Adhoc Query

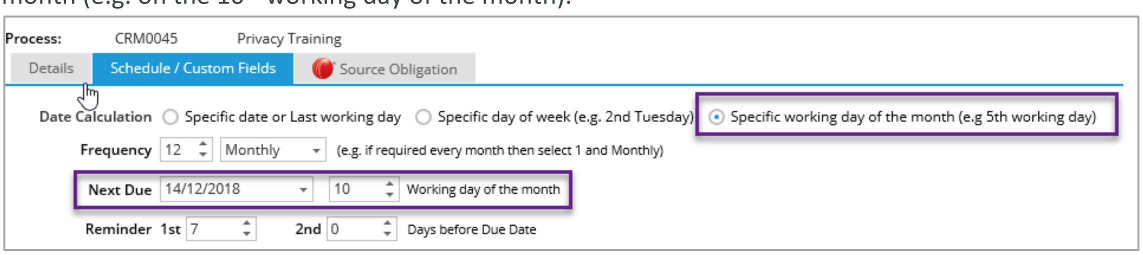
The Source Obligation has been added as a column in the Adhoc Query for Compliance Process and Process Control data.





Task Due Working Days

It is now possible to set a Process Control Task to be due a set number of working days into the month (e.g. on the 10th working day of the month).

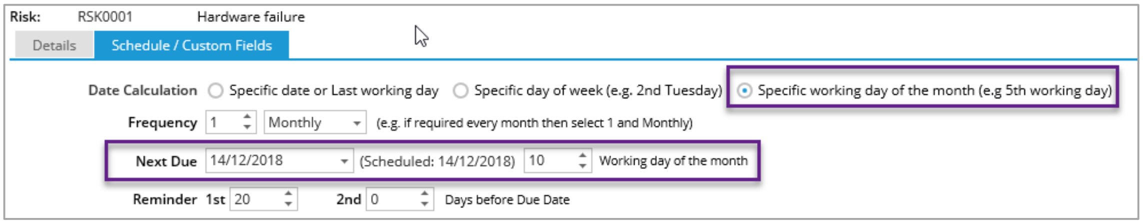


Please Note: It is important that you maintain the list of Holidays from the Maintenance menu.

Risks

Task Due Working Days

It is now possible to set a Treatment Task to be due a set number of working days into the month (e.g. on the 10th working day of the month).



Please Note: It is important that you maintain the list of Holidays from the Maintenance menu.

KRI History

Import history via API

It is now possible to pass data from a 3rd party application directly into a KRI (optional). TriLine GRC will provide the specifications on how to connect and load data. Any changes to the 3rd party application will need to be undertaken by the vendor or others (as appropriate), but we will provide assistance.

The KRI must already exist in TriLine GRC and have the Indicator as one of Upper Limit, Lower Limit or Range. Default calculation of Trend and Rating will occur, and an alert will be sent to the KRI Owner if the Rating is not 'Acceptable' (based on your configuration).

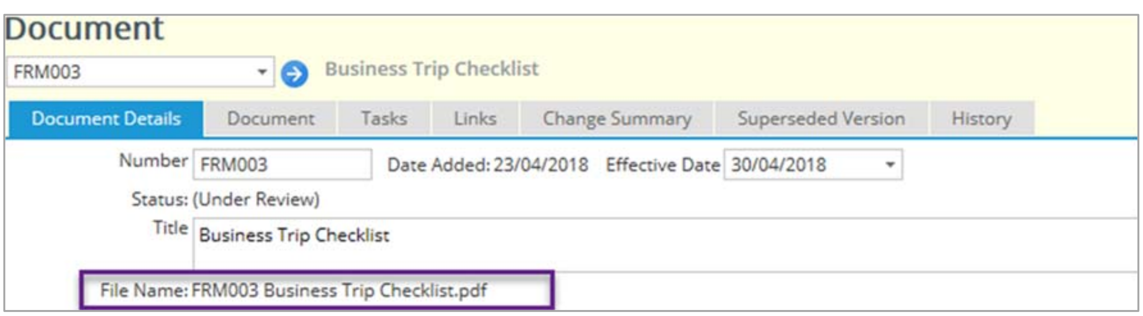
Document Library

Read and Certify Tasks

If a Position has a current Read and Certify Task for a Document, that Document will appear at the top of the View Documents list for ease of access. **Note:** Documents can also be viewed from the My Summary page.

File Name

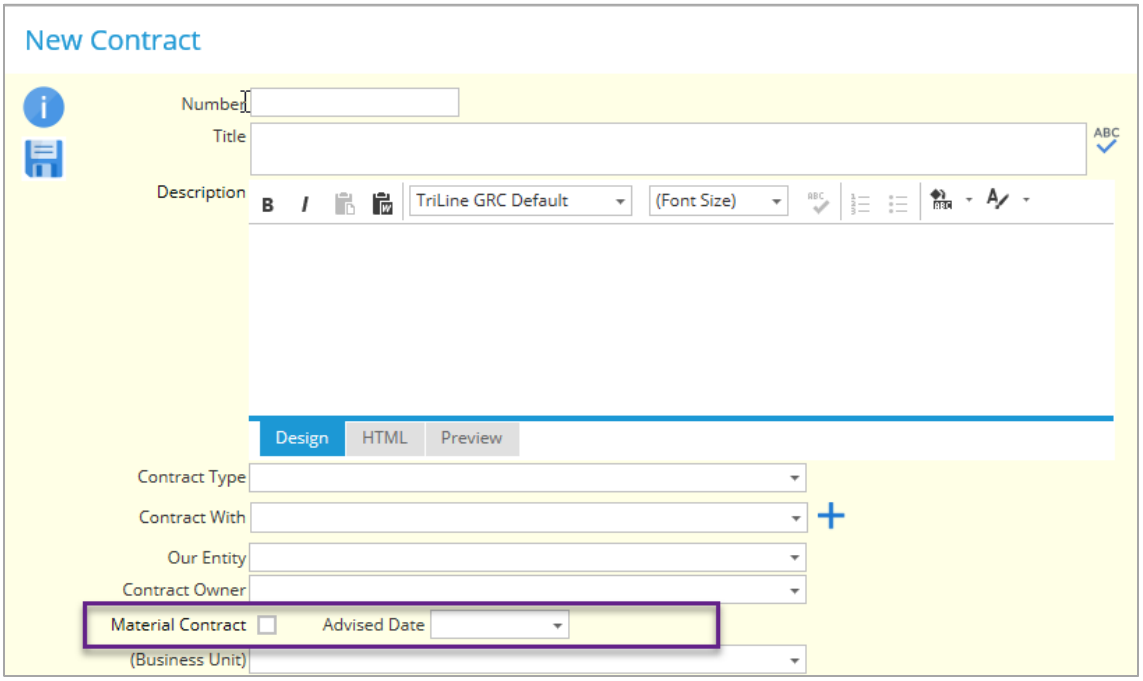
The original file name of a Document will be displayed on the page.



Contracts

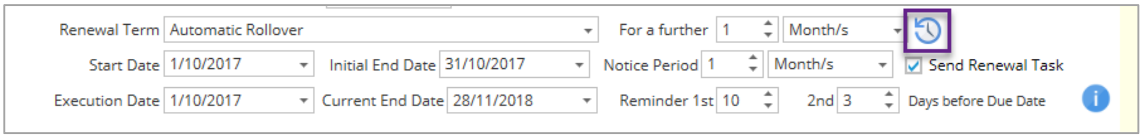
New Contract – Material Contract

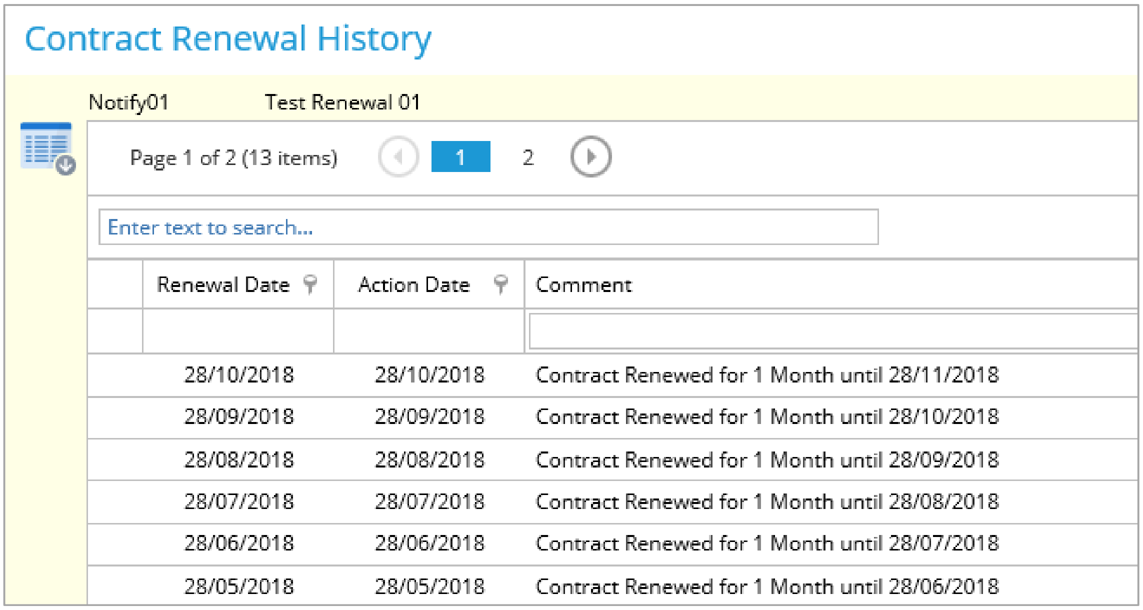
It is now possible to input the information regarding a Material Contract when the Contract is created in TriLine GRC.



Contract Renewal History

The Contract Renewal History for an individual Contract can be displayed from Contract page.

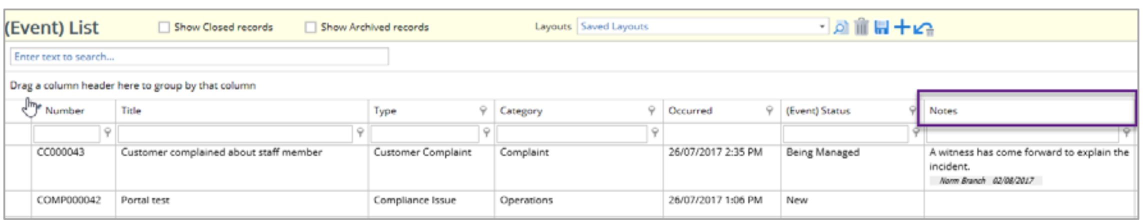




Events

Notes

Any Notes added to an Event can now be displayed in the Event List.



Event Task Adhoc Query

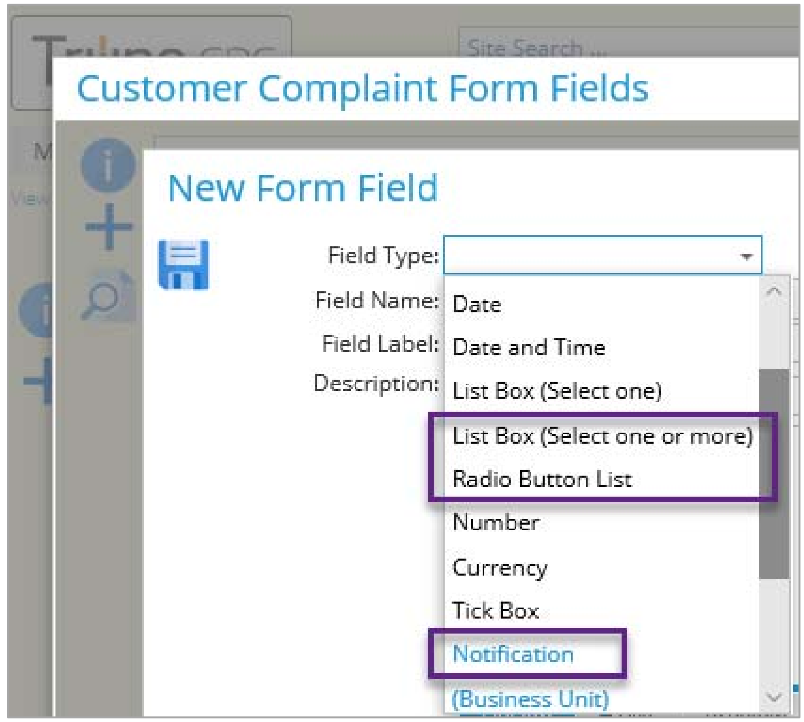
An Adhoc Query for Event Tasks has been added.

Event Form Fields

Three new types of fields have been added to the Event Form:

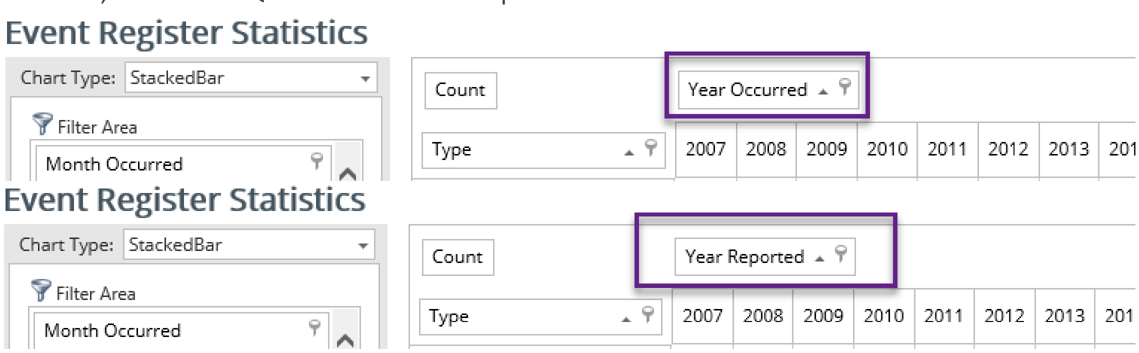
1. List Box (Select one or more)
2. Radio Button List
3. Notification

These new fields mirror the available field types for Registers.



Statistics

The Year, Month and Quarter of the Date Reported of an Event have been added as filters.



Scheduled Reports

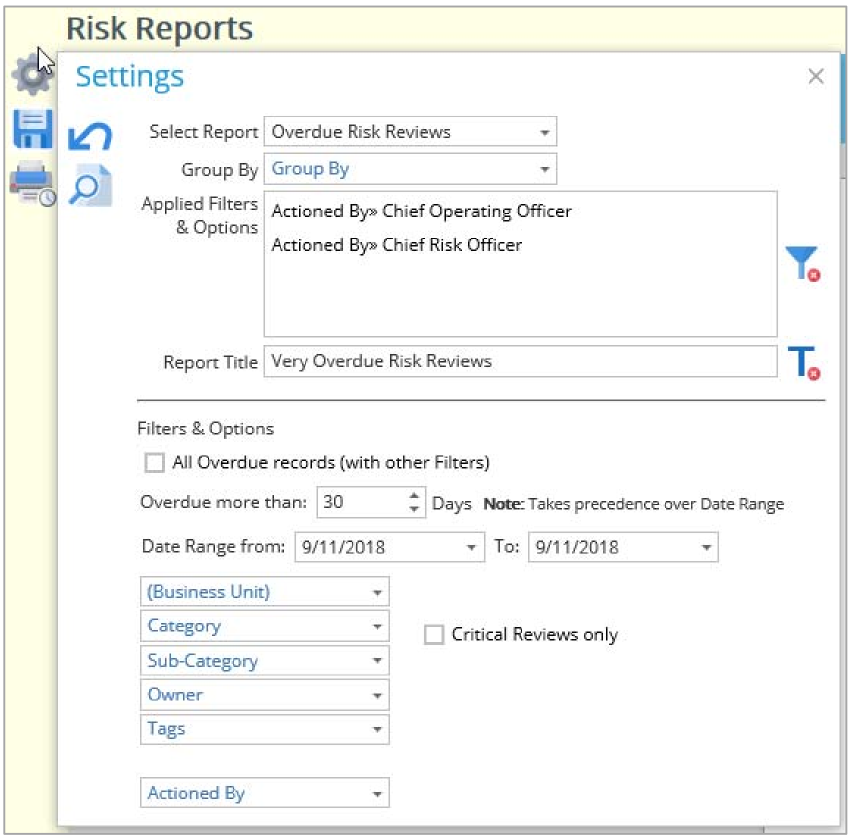
Scheduled Reports is an optional Module that allows most of the standard TriLine GRC reports to be automatically created and distributed via email.

An icon will appear if the report can be scheduled. 

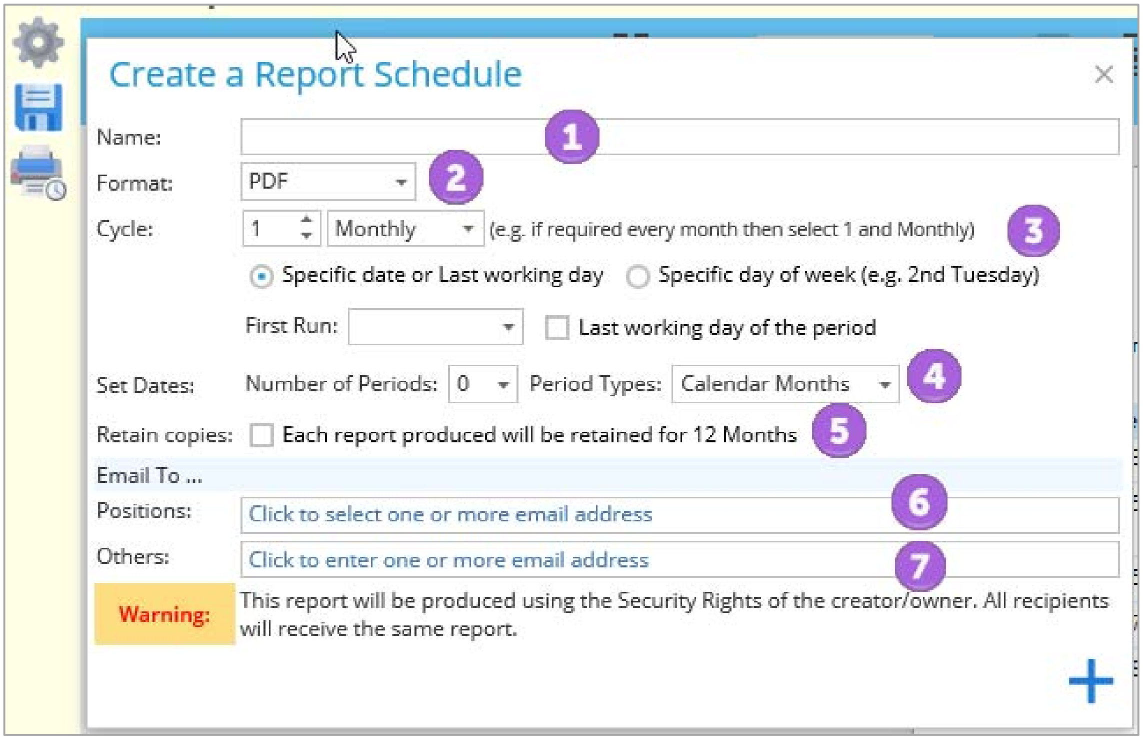
Please Note: When a report is produced, the data will be relevant to the security settings of the report owner. All recipients will receive the same report.

Creating a Scheduled Report

First set the report filters as per normal. Test that the report returns the correct result.



Then, click the Schedule Report icon.



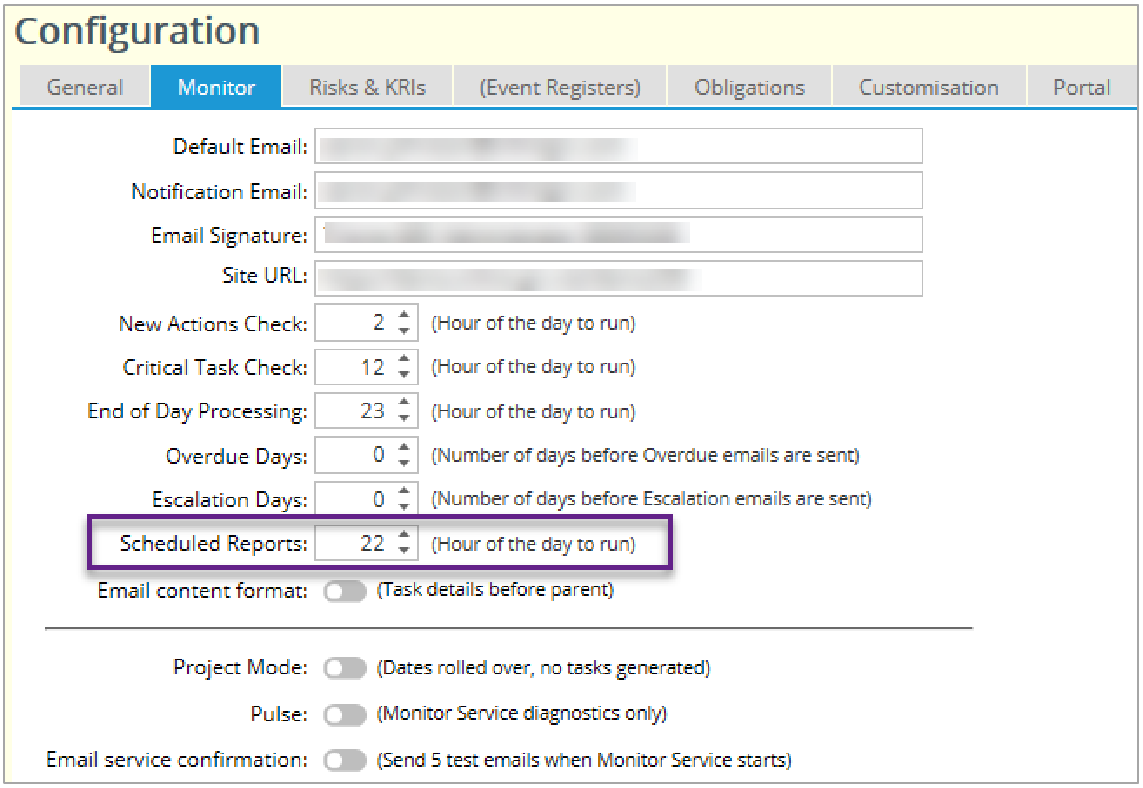
Complete the information required:

1. The Name is used as a reference. It can be the same as the report title set above.
2. Select the output format of the report: DOC, DOCX, PDF, RTF.
3. Set the cycle for the report production.
4. The 'Set Dates' option will be available if used in the reports. For example, to show the completed tasks for the previous 6 months select '6' and 'Calendar Months'. **Note:** For Overdue reports selecting 'Number of Days Overdue' will take precedence over a date range.
5. You can retain a copy of each report for up to 13 months within TriLine GRC and view or download historical versions.
6. Select from the list of available TriLine GRC Positions to receive a copy of the report.
7. Enter one or more email address, separated by a comma, for any other people who you want to receive a copy of the report (e.g. Board Members, Auditors).

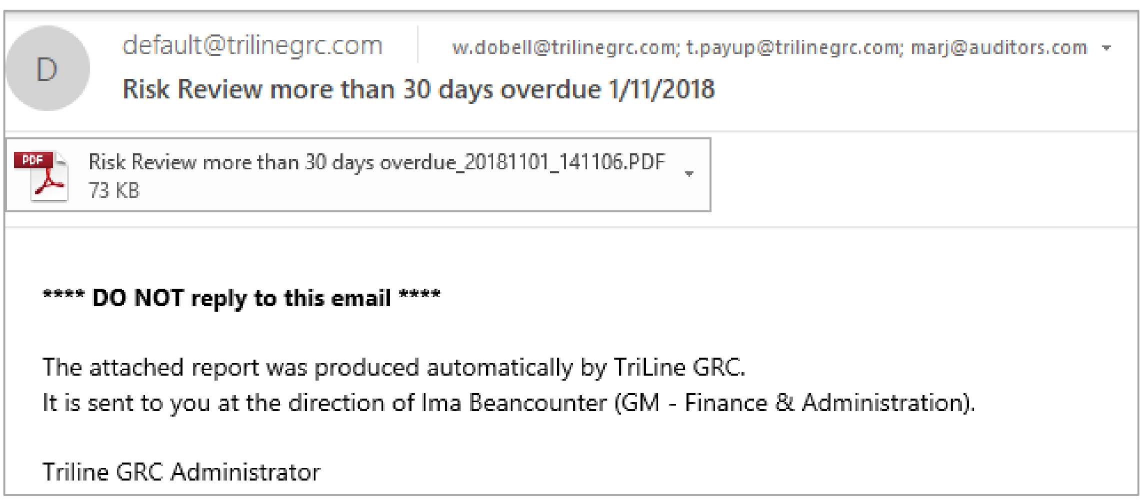
Click the 'Plus' icon to save the new report schedule.

Creating and distributing the report

Reports are created and distributed by the TriLine GRC Monitor. You can specify the time of day when this occurs in the Configuration.



The report is distributed by email.



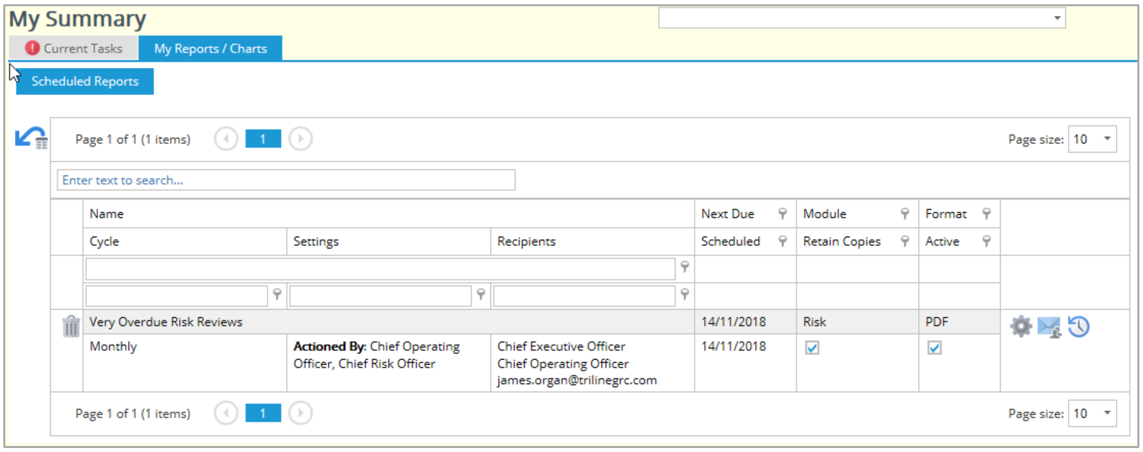
Report Rollover

When report due dates are rolled over, if the due date is a holiday or weekend, the next run date will move to the 'next' working day to ensure that data is correct. If, for example, you had a report showing completed tasks for the previous calendar month that is scheduled to run on the 2nd of the month. In December 2018 the 2nd is a Sunday. If we moved the run date to the previous working day

(30th November) the report would calculate the previous calendar month as October, not November (the desired result).

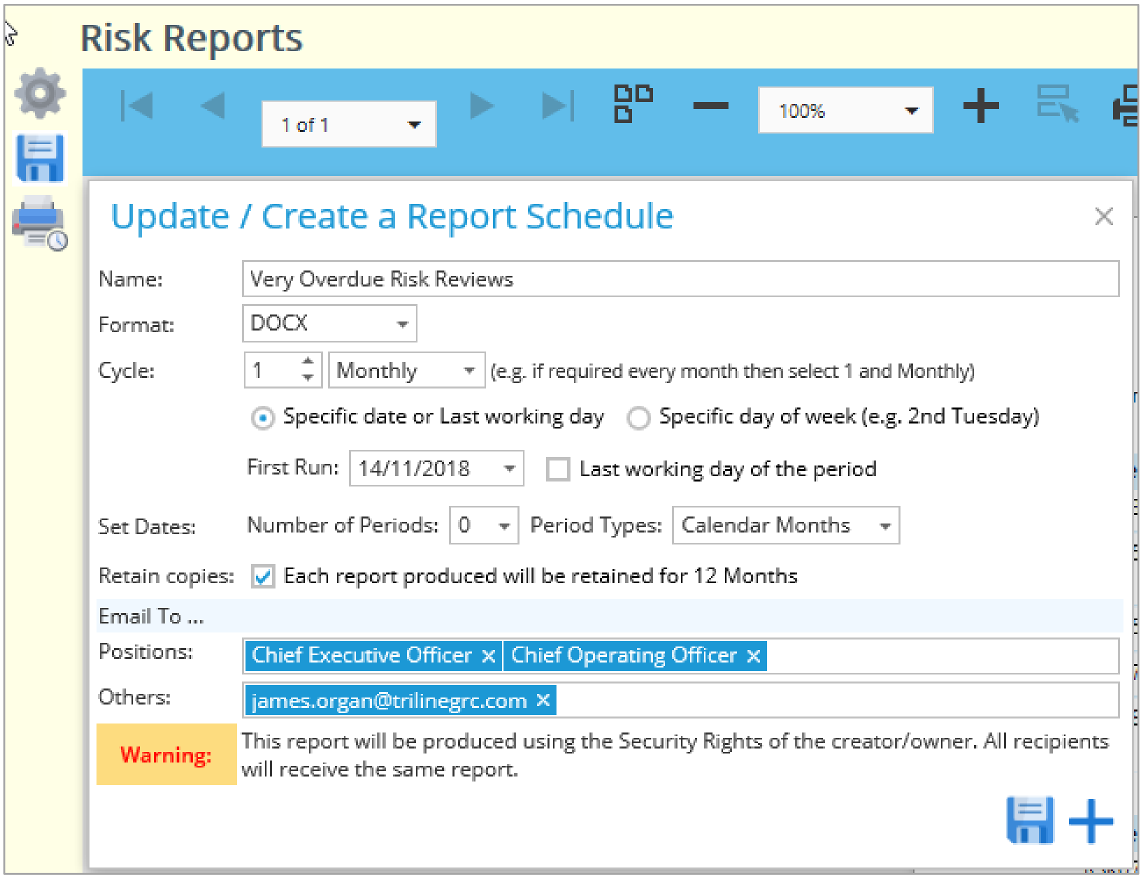
What reports do I have?

The list of reports created by a Position are available on the My Summary page or the 'Scheduled Reports & Saved Report/Charts' page.



Changing the report settings

Click on the 'Cog' icon next to the report (shown above) and it will open the report in the original page. Make any changes to the report filters and settings then click the Schedule Report icon. Make any changes to the report schedule then click the 'Save' icon.



Replicating a report

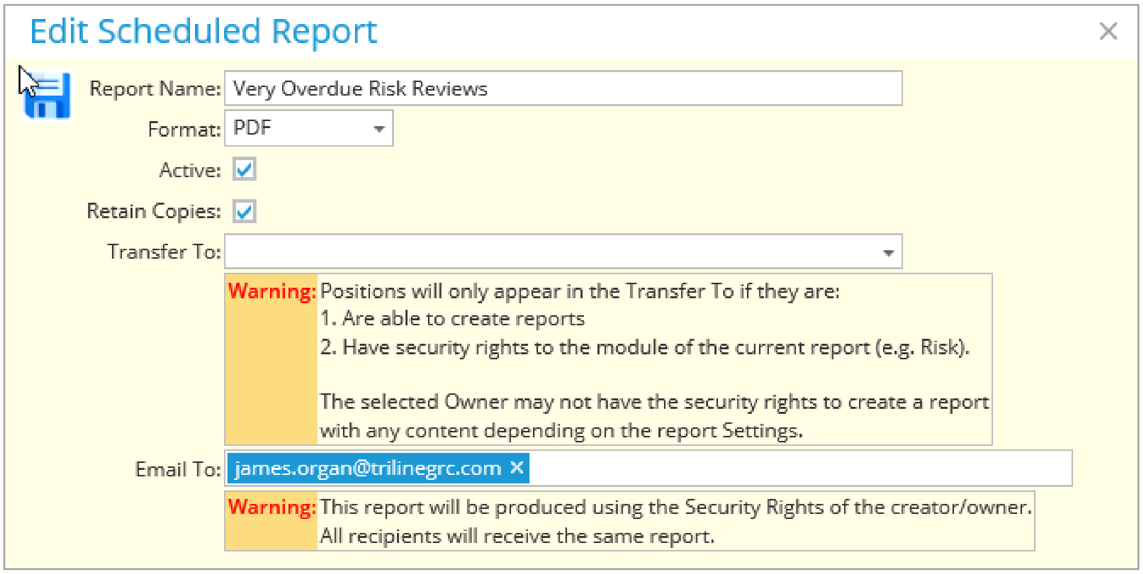
If you need to create another version of the report with some differences (e.g. different filters and distribution list), follow the steps in changing a report.

Note: Change the Report Name to avoid any confusion.

When all necessary changes have been made, click the 'Plus' icon to save the new report schedule.

Transferring report schedule ownership

To transfer the ownership of a report schedule to another Position, display the list of your reports from My Summary or the ‘Scheduled Reports & Saved Report/Charts’. Click anywhere in the report line.

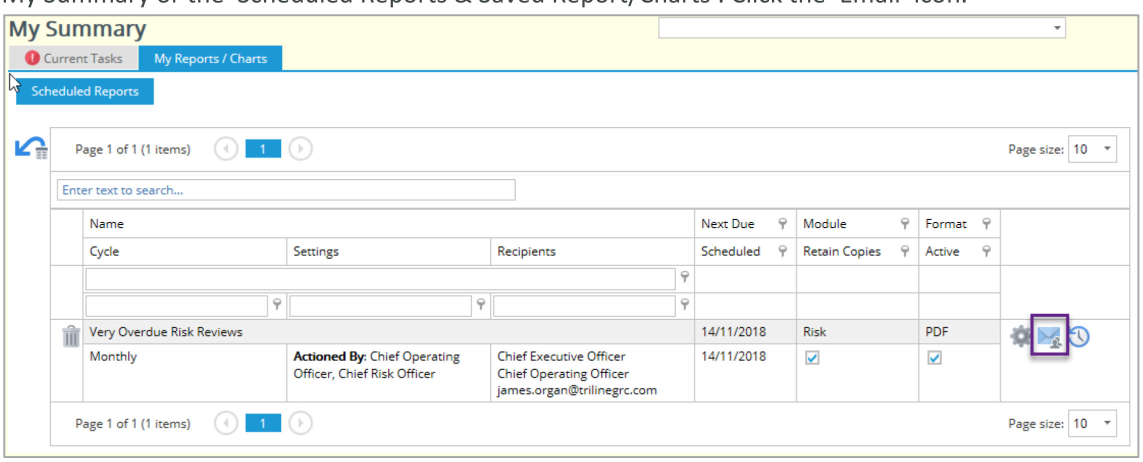


Select the new owner from the Transfer To field then click the ‘Save’ icon.

Please Note: It is also possible to update some of the schedule details.

Running the schedule now

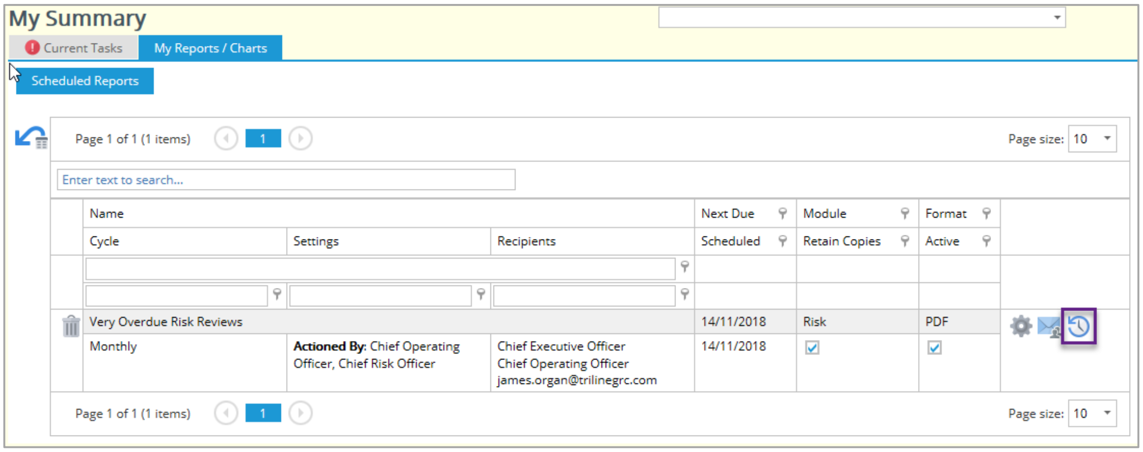
If necessary, you can run and distribute a report immediately. Display the list of your reports from My Summary or the ‘Scheduled Reports & Saved Report/Charts’. Click the ‘Email’ icon.



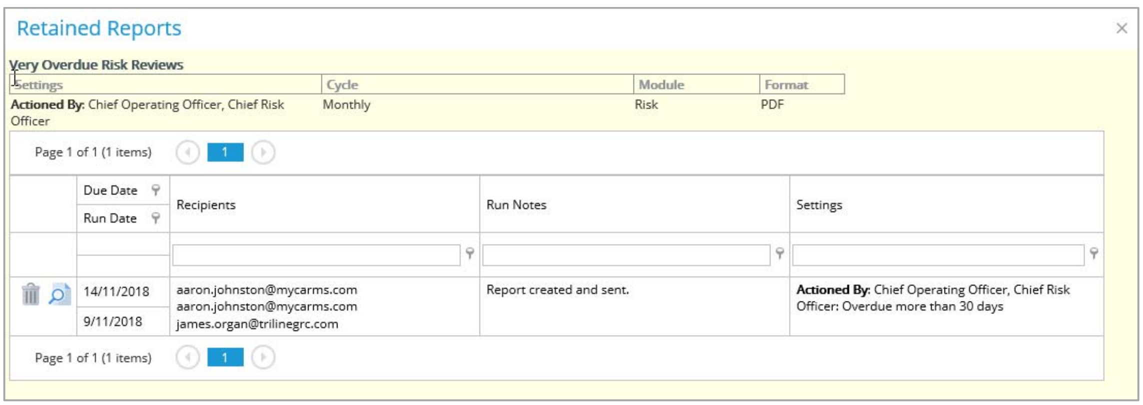
The report will be created and distributed immediately and the next Due Date will be rolled over.

Viewing previous reports

Display the list of your reports from My Summary or the ‘Scheduled Reports & Saved Report/Charts’. Click the ‘History’ icon if report retention has been selected for that report.



The previous reports will be displayed in a popup window.



Click on the ‘View’ icon to display the report.