Triline GRC

Version 3.0.0 New Features

May 2019

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

Interface

The first thing you will notice with this release is the new, contemporary interface.

Logging in

On the login page you can now press the Enter key instead of having to click the Login button.

Page menu replaces the button bar

On most screens there was a vertical button bar on the left side. This has been replaced by the 'hamburger' menu icon in the page header.
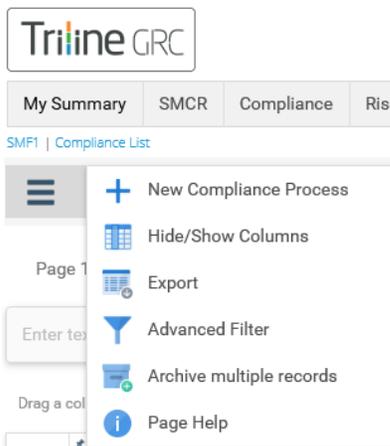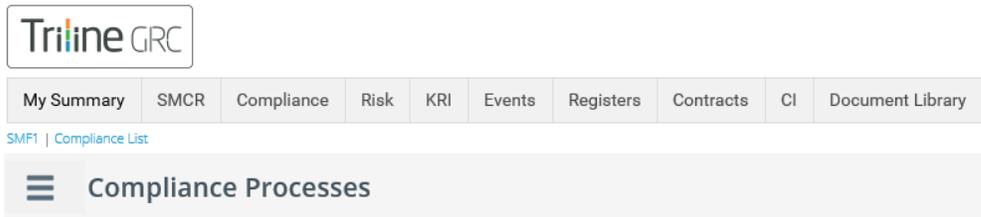
Simply mouse over the icon to display the menu (no need to click the icon).

Tabs

On some pages the tabs will now appear vertically rather than horizontally.

Logout

Using the Logout button is strongly recommended as it releases system resources for other users. The button has been changed to make it more obvious.
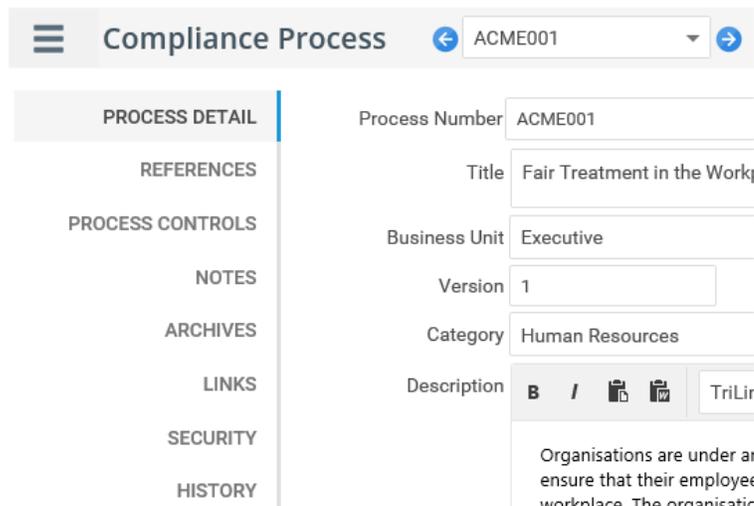
Calendar View of Tasks

It is now possible to display a calendar view of Tasks.

Click the icon to the right of the Position selector on the My Summary page to display that Position's Tasks in a calendar view. The default view is a 'Timeline' for the next 12 months.
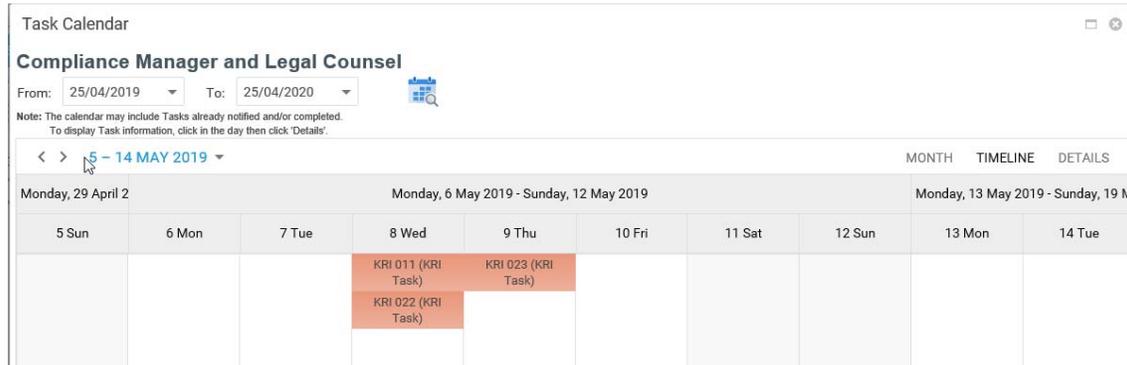
Click on 'Month' to display a view by Month. To display the details of each day, click on the day area and the click 'Details'.
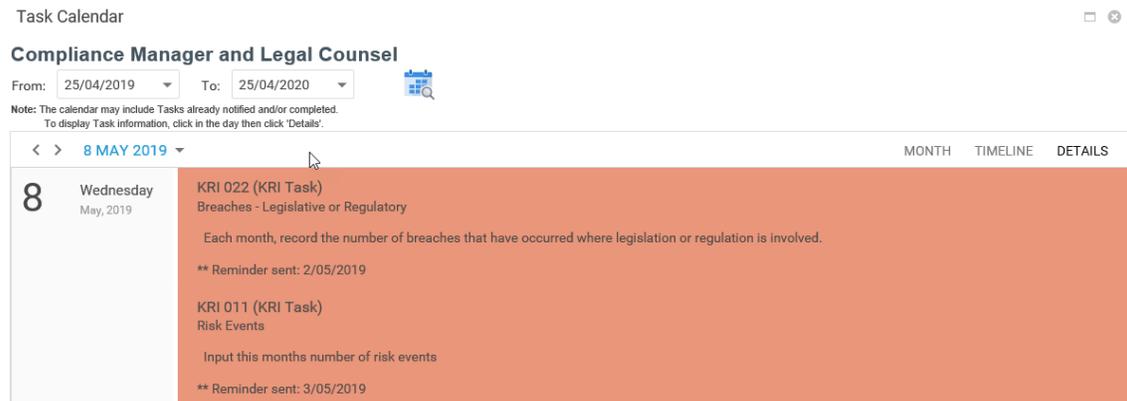
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Grid Context Menu

On the primary grid pages (e.g. List of Compliance Process records), right-click the header to display a context menu.

You can display the Column Chooser popup (instead of using the page menu), show or hide the Group Panel, Search Panel, Filter Row and Filter Row Menu.

For the column that you clicked you can 'hide' the column (e.g. move it to the Column Chooser) and Sort by that column.

Portal Login

The Portal Login page now shows the Password Strength Indicator if that is selected in the configuration.

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Security Access Summary

You can display a list of every Position that has access to an individual record. Click the Positions icon on the Security tab of the record.

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Add individual detail on Import

After using the Import records facility, you can modify the default selections for individual records.

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List Box or Tick Box Custom Fields in Statistics

List Box and Tick Box Custom Fields will now appear in the Statistics pages.

Report page view

The page view of reports can be configured to show all pages (allowing you to scroll through the pages).

Editing Event and Register records

To expedite editing Event and Register records where there is a large number of fields, we have added a scroll bar to that tab. The height of the visible area will fit within your screen.

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Position and Notification field types for Events and Registers

These two fields will now display the name of the person in the Position.

Allow multiple selection in Notification field for Events and Registers.

The Notification field type now allows multiple selections for new Events and Register records.

New Register record

🚩 **Breach**

Step 1 of 3

Summary description:*	A breach occurred

Breach Details

Enter the date the Breach occurred:*	1/04/2019
Enter details of the possible Breach:*	The breach occurred

Send Notification to:*
- ☐ Branch Manager - South (Josh Reynolds)
- ☑ Chief Executive Officer (James Page)
- ☑ Chief Financial Officer (Paul Levesque)
- ☑ Chief Operating Officer (Phillip Brooks)

Action taken:

Reminder Date as column in Task lists

All Task lists include the Reminder Date as an available column.

Compliance Process ACME001 → Fair Treatment in the Workplace

PROCESS DETAIL
REFERENCES
PROCESS CONTROLS
NOTES
ARCHIVES
LINKS
CUSTOM FIELDS
SECURITY
HISTORY

Page 1 of 1 (1 items) 1

Enter text to search all visible columns ...

	Seq	Task	Reminder Date	Next Due	Task Responsibility
🗑	A	Does the organisation have processes and procedures to ensure that employees and other workers do not suffer unfair treatment in the workplace? Please attach a copy	17/05/2019	31/05/2019	Chief Operating Officer

Edit Rights over See Own Data Only

A Position that has the See Own Data Only flag set on can have Edit Rights to a record if they are in a Security Group with Edit Rights to the record and are selected as the Owner / Manager / Responsible Officer.

Security Centre

Password Strength

It is no longer possible to create a Position in the Security Centre with a weak password.

Bulk Update

It is now possible to perform an update of multiple Positions via a spreadsheet (e.g. as part of a restructure). Select Bulk Update from the Security Centre page menu.

Create the spreadsheet.

Triline GRC

TriLine GRC V3.0.0 — New Features

Select the Positions to be updated.

Save the spreadsheet and then make the necessary changes.

	A	B	C	D	
1	User Id	Position Title	New Title	First Name	Surname
2	CBG	Compliance Manager and Legal Counsel	Compliance Manager	Jeff	Albertson
3	CSJ	Corporate Secretary	Company Secretary	Jane	Smith
4	CreditM	Credit Manager	Executive Manager Credit	William	Buck
5	FM	Finance Manager	Executive Manager Finance	Mark	Calaway
6	HPC	Head of People and Culture	Executive Manger People and Culture	Milan	Vandersmisson

Changes can be made to: Title, First Name, Surname, email address and Escalate To. A welcome email can be sent (e.g. if the person in the Position has changed). A Position can be made Obsolete (standard validation applies).

Note: If the Title is not changing leave the New Title field blank.

From the Bulk Update popup select the spreadsheet to be uploaded then click Load the Bulk Update.

Any errors will be displayed on-screen.

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Positions Tab

The Positions grid now includes the facility to save layouts and has four extra fields (Escalate To, Email, Security Group membership and Task Team membership)

Portal Tab

The Portal grid now has the facility to save layouts and Email as an optional field.

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Compliance

Compliance Process Statistics

The Compliance Process Statistics will include Business Unit, Category, Risk Rating (if configured), Likelihood (if configured), Consequences (if configured) and any List Box or Tick Box custom fields.
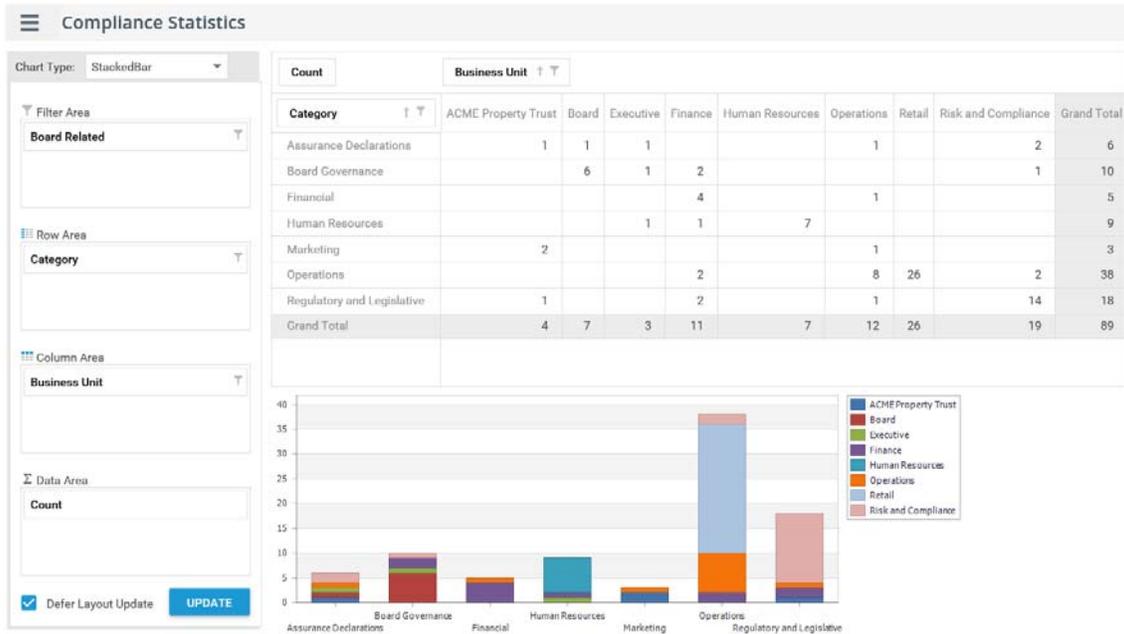
Risks

Generate an alert when a Risk is modified

If configured, an alert will be sent to the Risk Owner if the Risk is modified in any way by a person who is not an Owner. This includes completing a Risk Review, modifying the Risk Rating or Risk Score.

Modify the settings for the Risk Aggregation by Category charts

Select Chart Settings from the page menu then modify the chart type.
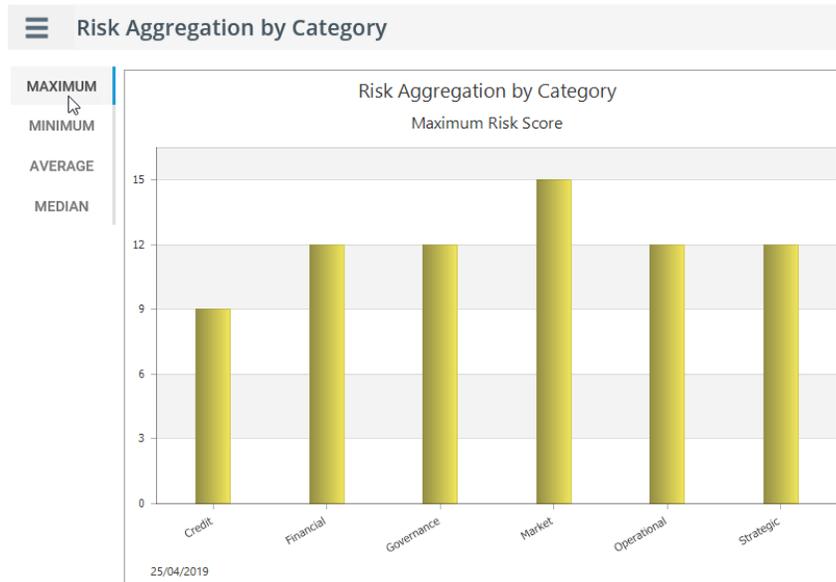
Optional Risk Assessment Features

Displaying the Treatment Plan, Capital Allocation, Risk Status and Inherent Risk are now optional.
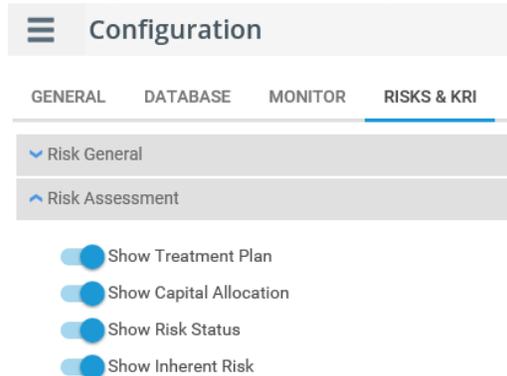
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Key Risk Indicators

Customisation of display Title

The display title for KRI can be customised.

Link to Compliance

KRI records can be linked to Compliance Process records.

Target optional in History chart

The Target value is optional in the KRI History chart.

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Trend chart in 6 Month Summary report

A Trend chart plotting the value in comparison to the Warning Start and Warning End will be included in the 6 Month Summary report (it can be excluded).
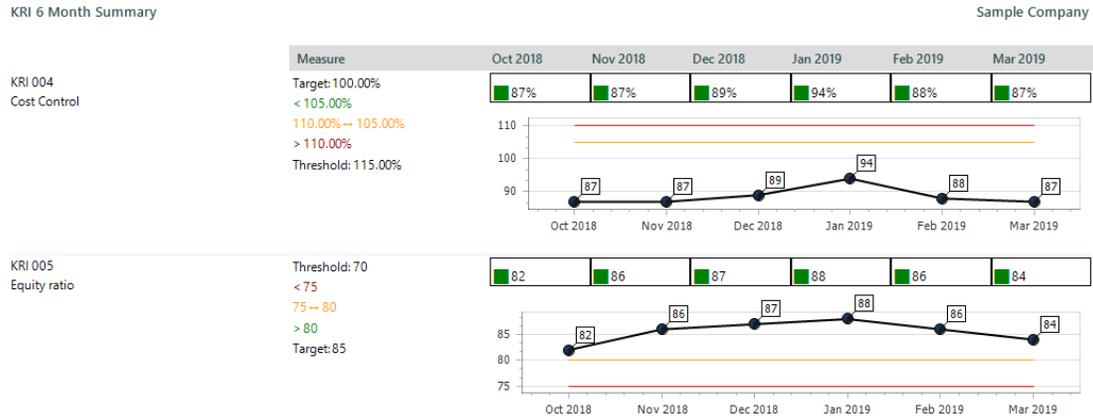
To ensure the values and the chart are read in the same direction you may want to change the History Order setting in the Configuration.
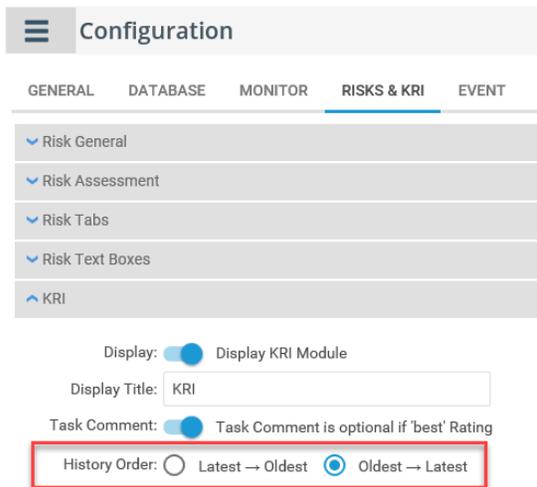
Please Note: The chart shows a Trend line and there may not be a zero point.

Events

Pre-defined Links

When a new Event is created you can automatically link it to any other module record.

In the example below, a new Customer Complaint Event will be automatically linked to KRI 013 and KRI 016.

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Send email notification to Event Manager on Task completion

For each Event Task you can specify if the Event Manager is to be notified when the Task is completed.
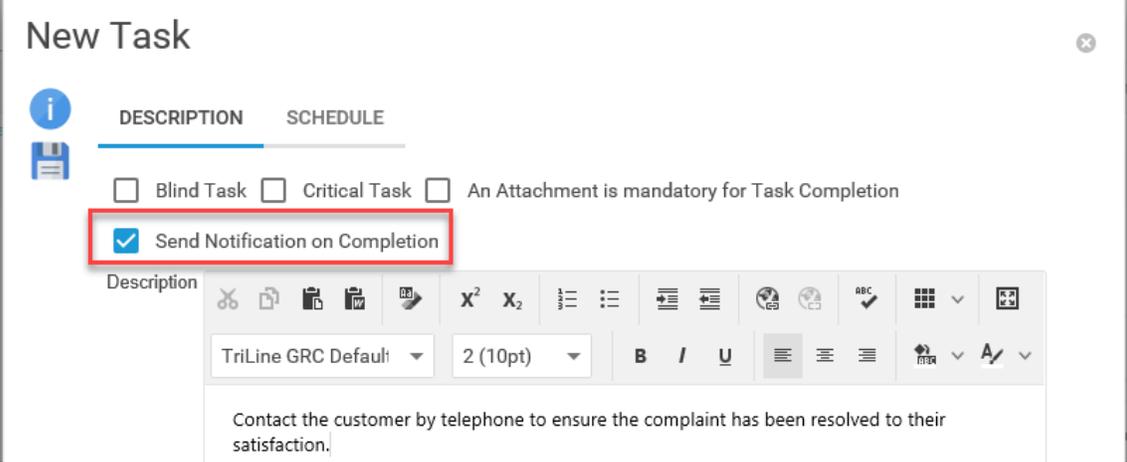
A notification will not be sent if the Task is completed by the Event Manager.

Task Due field

If the Due Date of a generated Event Task is changed (using Change Task Due Date), the Task grid will display the new Due Date.
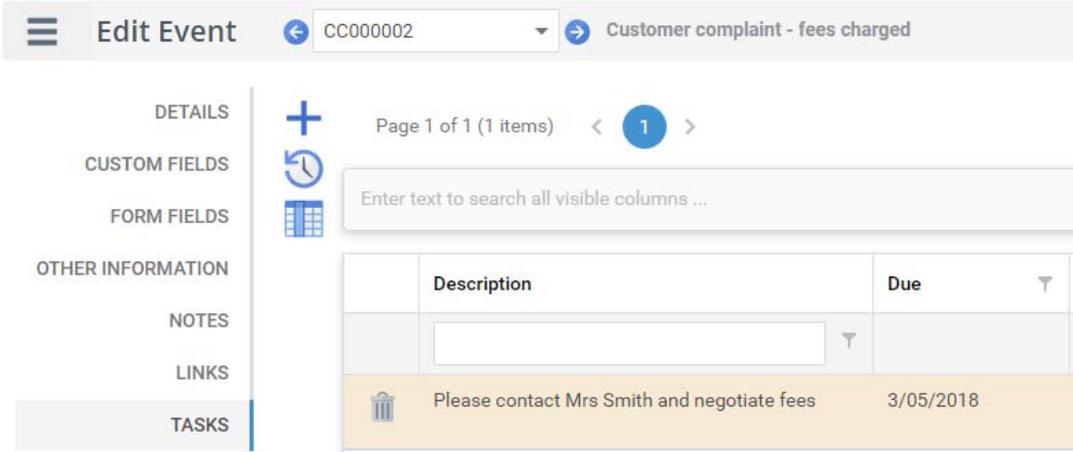
# TriLine GRC V3.0.0 — New Features

Rating field type

The new Rating field type allows you to add Likelihood and Consequences to an Event. The available values are from the Risk Likelihood and Consequences settings. The calculated Rating uses the Risk Rating values.
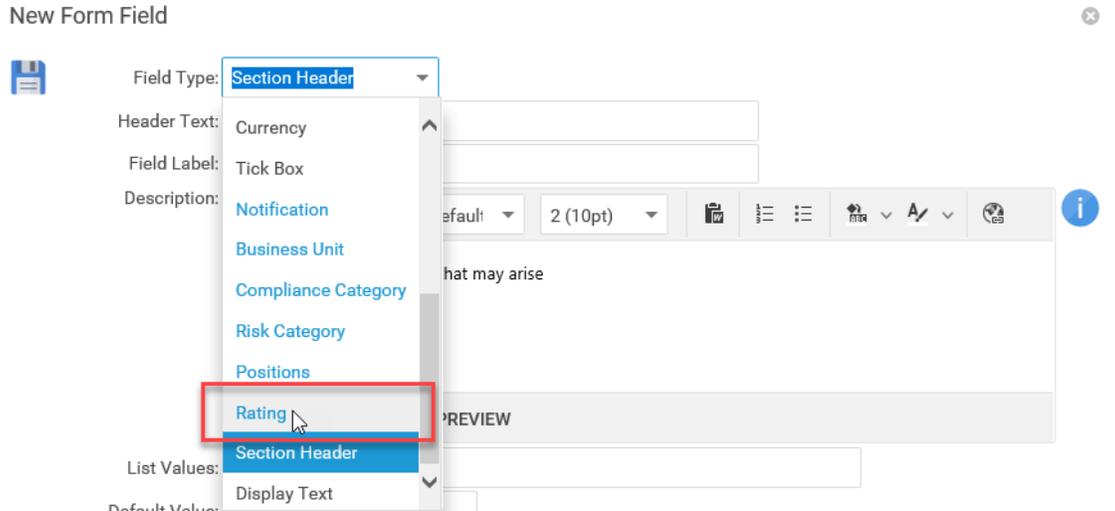
User ID

The User ID of the Position that created the Event is available as an optional column in all lists.

TriLine GRC V3.0.0 — New Features

Registers

Cyclical Tasks

Register Tasks can now be setup to occur on a cycle (e.g. Monthly).
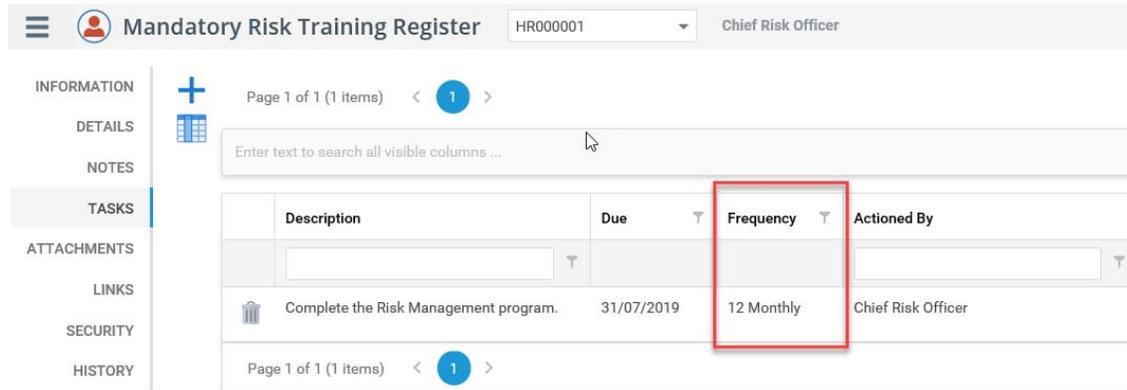
Existing Tasks

All existing Tasks, completed or otherwise, will have the Frequency set to AdHoc.

Selecting a Frequency

If a Task is not to occur on a cycle, the Frequency must be set to AdHoc. If a Position allocated to complete a Task is to be made Obsolete, any Tasks with a Frequency of AdHoc that have been completed, will not hinder the Position becoming Obsolete. The Position will not be able to be made Obsolete if the Frequency is other than AdHoc or and AdHoc Task has not been completed.

Administrator – Registers

A new System Group (Administrator – Registers) has been added. Members of this group will have Administrator level security access to all Register Types and records.
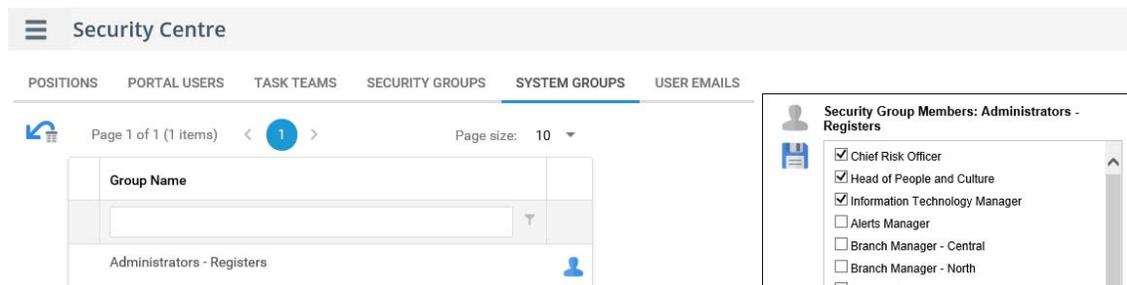
TriLine GRC V3.0.0 — New Features

User ID

The User ID of the Position that created the Register record is available as an optional column in all lists.


Menu

To improve the functionality where there are a large number of Register Types, the menu will now display the available Types with a scroll bar.
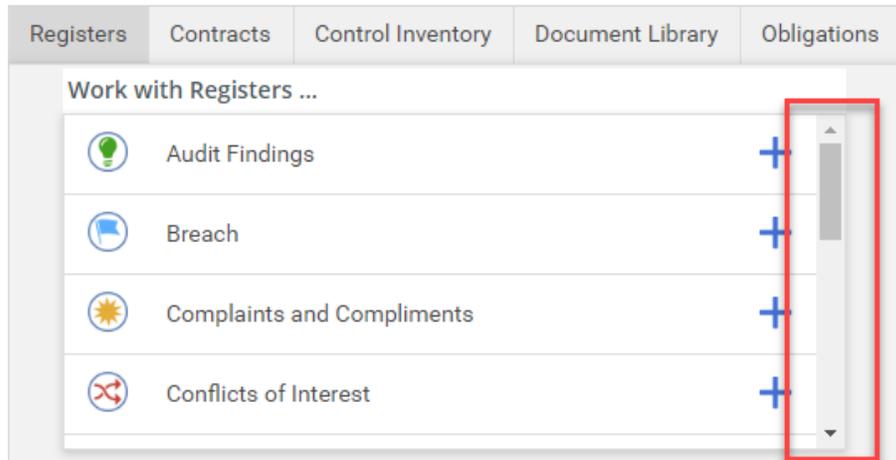
TriLine GRC V3.0.0 — New Features

Interactive Dashboard

You can now create an Interactive Dashboard for Registers.
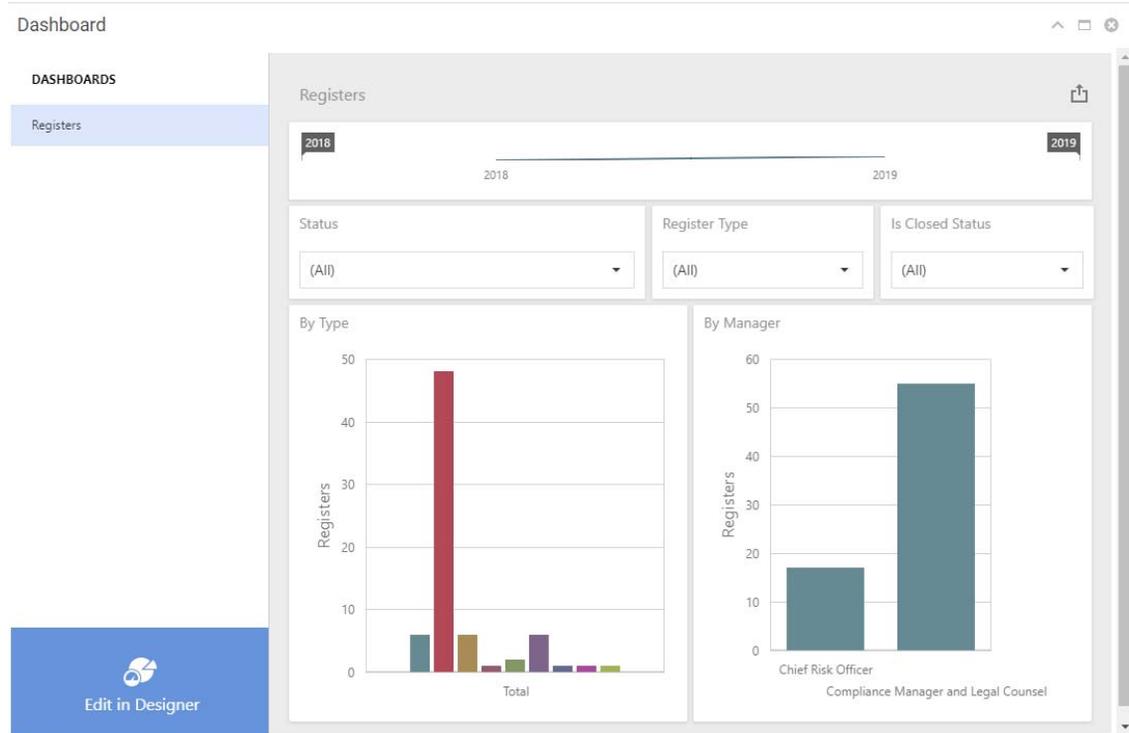
Pre-defined Links

When a new Register record is created you can automatically link it to any other module record.

In the example below, a new Customer Complaint and Compliments recor will be automatically linked to KRI 013 and KRI 016.

TriLine GRC

Contracts

Renewal / Termination Gantt chart

The Contract Renewals / Terminations chart will show when charts are due for renewal or termination and the notification period.
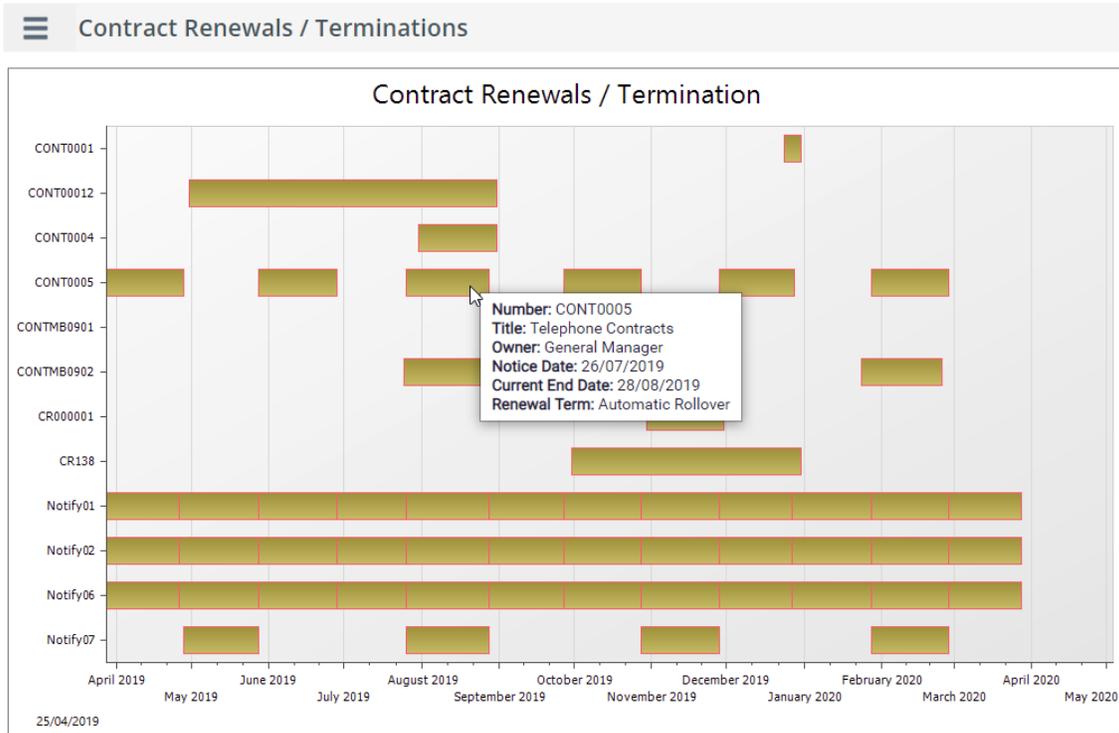
Linked Contracts

Linked Contracts will now appear in the KRI List and the Event List reports.

Change linked Document Type

You can now change the Type of a document linked to a Contract.

Contract With

A Contract With record can now be linked to any record in all modules.

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Document Library

Custom Fields

You can now create up to 5 Custom Fields for the Documents Library. If the field Type is a List Box it will be available as a filter for reports.

Document Reviews Gantt chart

The Document Reviews Gantt chart will show when Documents are due for review and the reminder period.
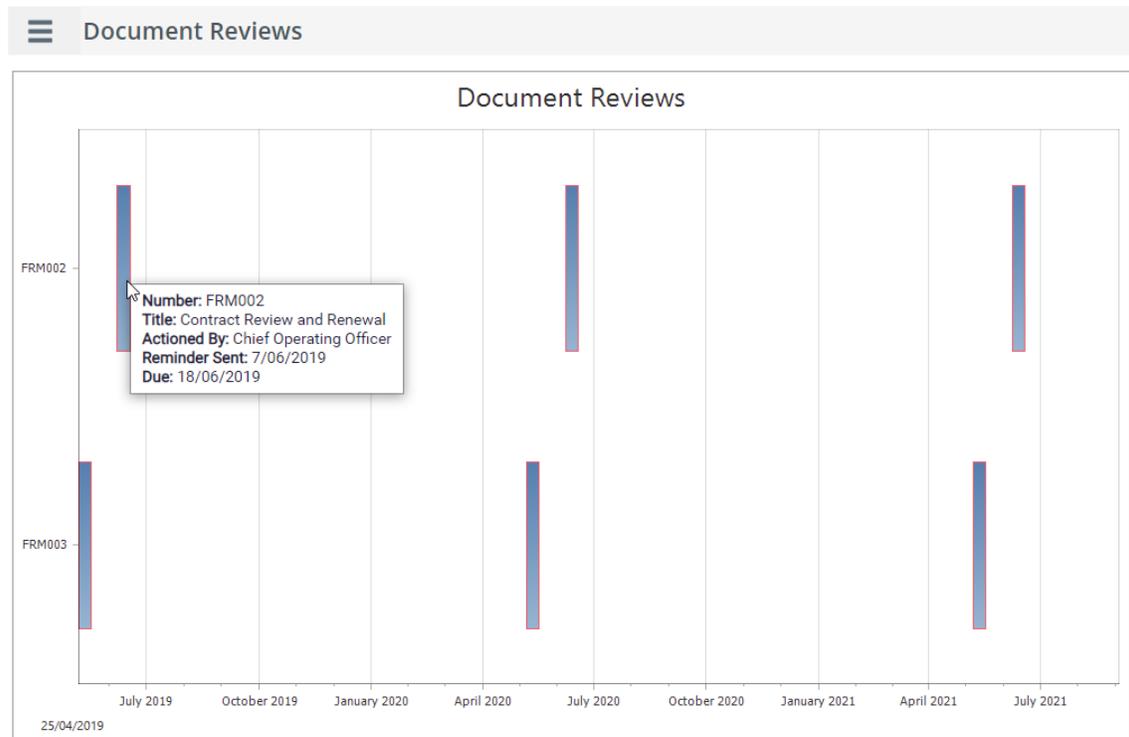
Documents being reviewed

Documents currently being reviewed will be highlighted in the list of Documents.

Obligations

Charts

Three new charts are available from the Obligations menu or on the Dashboard: Obligations by Owner, Obligations by Module, Obligations by Tags.
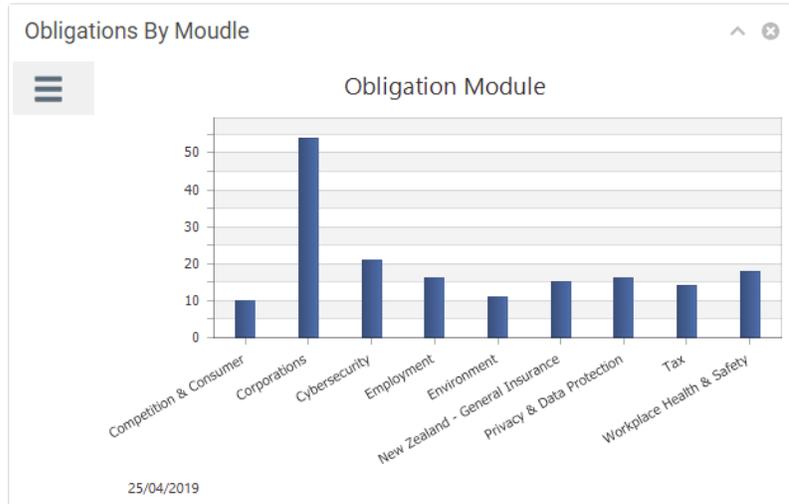
Gap Analysis

The Gap Analysis now includes the options to create a Link to a Compliance Process or to create a Compliance Process with the Obligation as the Source Obligation.

Charts

Outcomes

Business Unit, Category and Tags have been added as filters for the Process Controls and Treatments Outcome charts.