Triline GRC

Version 3.3.1.0 New Features

December 2021

TriLine GRC V3.3.1.0 — New Features

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TriLine GRC V3.3.1.0 — New Features

Note: Some terminology may vary depending on your Configuration settings. Refer to the Version History for more information.

Getting ready for v3.3.1.0

Upgrading to v3.3.1.0 can be arranged by contacting TriLine GRC Support to arrange a suitable date and time.

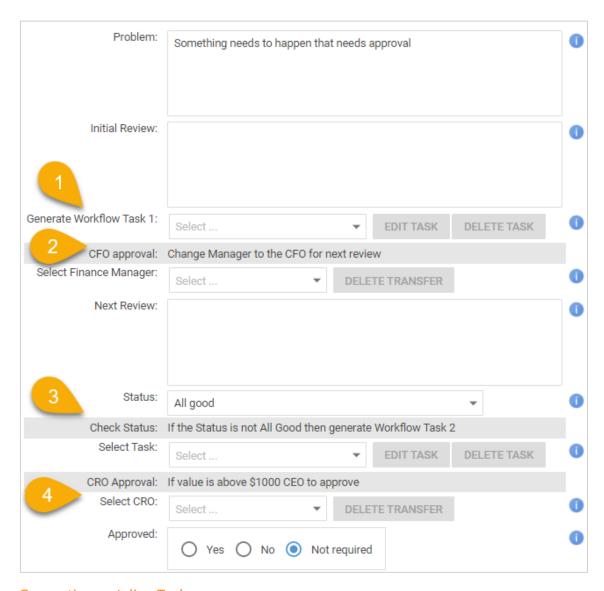## Workflow for Event and Register Forms

Two new Field Types are now available for Event and Register Forms to allow you to build workflow into the handling of an Event or Register. After a new record is created, the handling of that may require it to pass through a number of hands (e.g. an approval process) or you may want to generate a Task based on certain conditions. While this can be done using existing processes, having them within the Form will make it easier to conceptualise and manage. Both Field Types are 'backend only'.

Change Managed By	Select a new Manager for the record from Positions with the correct security access.
Inline Task	Generate a Task from the list of pre-defined Tasks for the record Type.

Each field type can appear multiple times on a form, but once used it cannot be re-used. The selected action (e.g. Change Managed By) won't occur until the record is saved. Tasks will be generated immediately on save and the email notification sent. After the control is used, the details of the action will appear in the Form (and any reports).

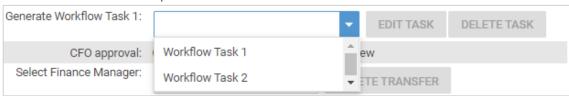The following example shows some steps in a very simple process:

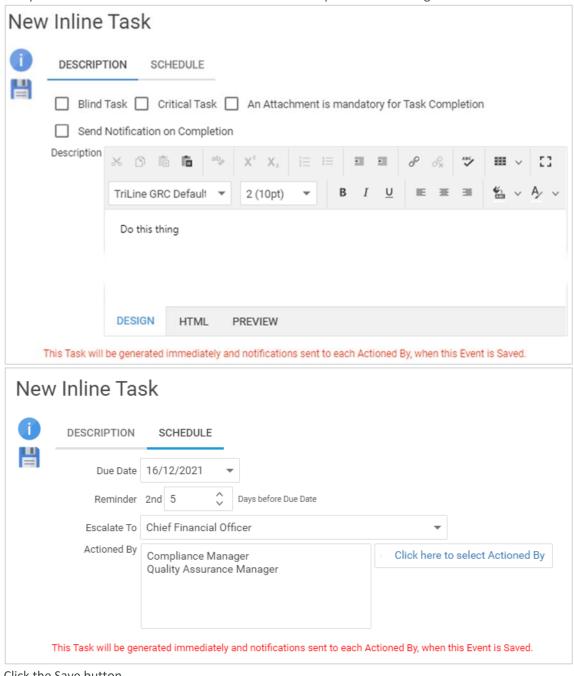| 1	Generate a Task after the first review
2	Change the record Manager to the CFO for the next review
3	If the 'status' is not a specific value then generate another Task
4	If the value is more than $1000 the CRO needs to approve

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Generating an Inline Task

Note: The Tasks need to be defined in the list Pre-defined Tasks for the record Type.

1. Select the Task from the drop-down list.

2. Complete the Task details as usual. **Note:** The Task Description can be changed.
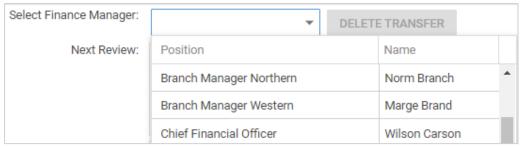

3. Click the Save button.

The Tick will appear to show that the Task is ready to be generated. If necessary, you can edit the Task or delete the Task prior to saving the record by clicking the appropriate button.

Remember: The Task will be generated immediately when the Event or Register record is saved.

Changed Managed By
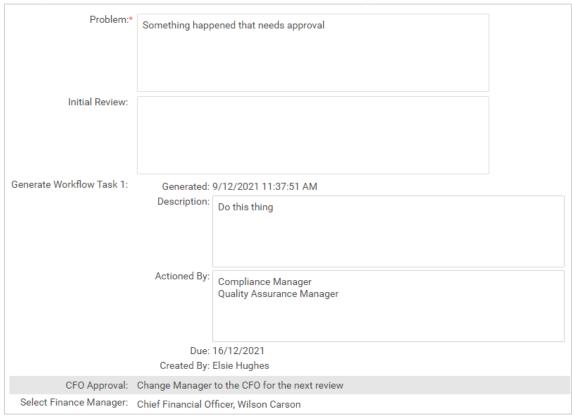
1. Select the required Position from the drop-down list.

Select Finance Manager:		DELETE TRANSFER
Next Review:	Position	Name
	Branch Manager Northern	Norm Branch
	Branch Manager Western	Marge Brand
	Chief Financial Officer	Wilson Carson

2. The Tick will appear to show that a Manager has been selected.

Select Finance Manager:	Chief Financial Officer; Wi ▼	✓	DELETE TRANSFER

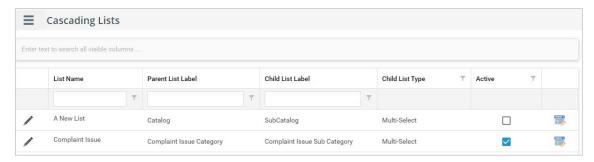If required you can remove the selected Manager by clicking the button.

After clicking Save

After the Save button has been clicked the task will be generated, the record Manager changed and the requisite emails sent in both cases. The selected values will appear in the Form:

Problem:* Something happened that needs approval

Initial Review:

Generate Workflow Task 1: Generated: 9/12/2021 11:37:51 AM

Description: Do this thing

Actioned By:
Compliance Manager
Quality Assurance Manager

Due: 16/12/2021
Created By: Elsie Hughes

CFO Approval: Change Manager to the CFO for the next review

Select Finance Manager: Chief Financial Officer, Wilson Carson

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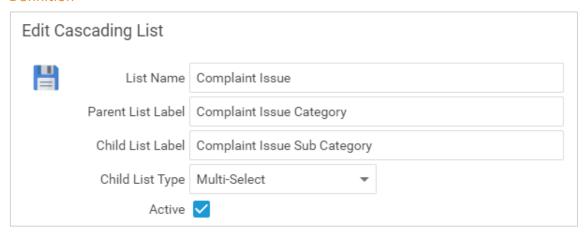
Cascading Lists

Cascading lists allow you to create your own two-level selection Lists to be used in both Events and Registers.

The menu item is available from both the Event and Register Maintenance menus.

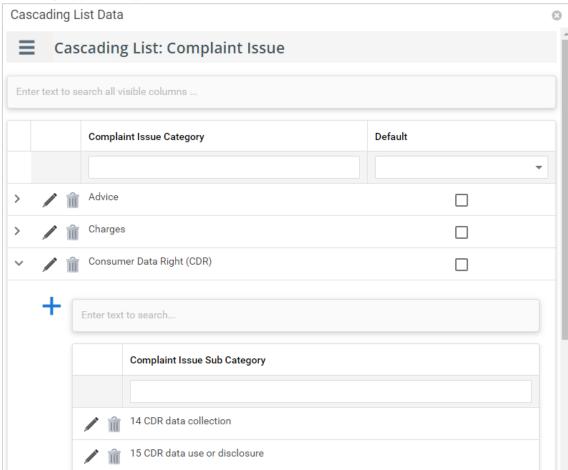| Parent	The top-level list
Child	The second-level list

Definition

List Name	Reference for the List. Displayed in the list of available Field Types when managing a Form layout.
Parent List Label	The default label of the parent field to appear when the Form is generated.
Child List Label	The label of the child field to appear when the Form is generated. This is not modifiable.
Child List Type	The child can be set to single or multi-select.
Active	If not Active, the field will not appear as an available Field Type.

Maintaining the List

Click the list icon at the right of the List information. The list is maintained in a similar manner to the Risk Category processing.
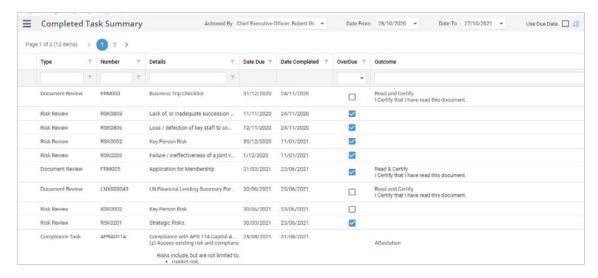

List information

The Parent and Child values for each Cascading List Type will be display in the Taxonomy report.
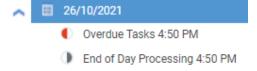
Completed Task Summary

The Completed Task Summary is available from the page menu on the My Summary page. Select the Position and date range to display the completed Tasks for all modules.

Other Changes

Monitor Logs

To improve the useability of the log file produced by the overnight TriLine GRC Monitor processing, it has been split into an Overdue Tasks and an End of Day Processing.

The Overdue Task log will show all the Overdue notifications. The End of Day Processing will show all other processing (e.g. Task Rollover).

3rd Party Attestations

The Contract Owner will receive an alert when a new Attestation completion task is issued. The alert will be displayed on the My Summary page.

Contracts

It is now possible to double click on a Contract With when viewing a Contract record to display the Contract With record.

Custom Fields

The Listbox and Number Custom Field Types no longer require a default value.

Notes

The Notes linked to a record are now available in grids and will be included in any export.

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New Events / Registers

When a new Event or Register record is created, the originator is allowed view access by default without a specific Security Group setting. They do not have access to notes or attachments added by other people. To provide more security around the content, they will not have default view access to any backend Form Fields. If this is required, then the standard Security requirements must be met.

Risk Category / Sub-Category

The number of characters for Risk Category and Sub-Category fields has been increased to 100.

Event / Register confirmation emails

New settings allow you to configure whether you will offer a user the option of receiving a Confirmation email and the 'Keep up to date' email.
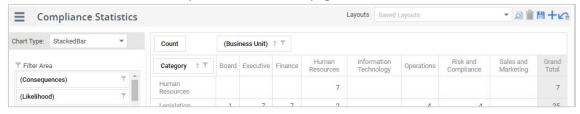

Grid Layouts

Improved saving of grid layouts to be used the next time a page is accessed.

Statistics

Added the feature to save the layout for the Statistics pages.

Overdue reports

The chart that appears at the end of an Overdue report showing the number of records overdue by period will now display even if there is only one series.

Register Date Closed

When a Register record is changed to a 'Closed Status' you will be able to specify the actual date it was closed.