

Version 25.2ab (Business Continuity Management)

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Improvements

Business Continuity Management

- The following elements were changed to improve form design:
 - Deleted the Plan – BCM – 3 - Plan Owner form
 - Remove the Continuity Team from the Plan – BCM – Main form
 - The button layout was realigned on the following forms:
 - Asset – BCM – Overview
 - Asset – Library – GRC – 1 – Overview
 - Continuity Strategy – BCM – Main
 - Location – BCM – Overview
 - Employee – GRC – 1 – GRC Teams
 - Person Library – GRC – 1 – Overview
 - Plan – BCM – Main
 - Product – GRC – 1 – Overview
 - Risk – BCM – 2 – Risk Review
 - Third-Party Library – GRC – 1 - Overview
 - Changed the trigger color on the following forms:
 - Asset – Library – GRC – 1 – Overview form Asset Library Workflow
 - Changed the color of the Create Trigger to blue
 - Continuity Strategy – BCM – Main form Continuity Strategy Workflow
 - Change the color of the Deactivate trigger to light grey
 - Change the color of the Return to Owner trigger to light grey
 - Location – BCM – Overview form location Workflow
 - Change the color of the Create trigger to blue
 - Employee – GRC – 1 GRC Teams form Person Status Workflow
 - Change the color of the Create trigger to blue
 - Change the color of the Archive trigger to light grey
 - Person Library – GRC – 1 – Overview form Person Library Workflow
 - Change the color of the Create trigger to blue
 - Plan – BCM – Main form Plan Workflow
 - Change the color of the Deactivate trigger to light grey
 - Product – GRC – 1 – Overview form Product Workflow
 - Change the color of the Create trigger to blue

- Change the color of the Archive trigger to light grey
 - Third-Party Library – GRC – 1 Overview form Third-Party Library Workflow
 - Change the color of the Create trigger to blue
 - Rename triggers
 - Continuity Strategy – BCM – Main form Continuity Strategy Workflow
 - Renamed the Activate Continuity Strategy trigger to Activate
 - Renamed the Deactivate Continuity Strategy trigger to Deactivate
 - Renamed the Return to Continuity Strategy Owner trigger to Return to Owner
 - Plan – BCM – Main form Plan Workflow
 - Renamed the Activate Plan trigger to Activate
 - Renamed the Deactivate Plan trigger to Deactivate
 - Risk assessment metrics have been moved onto a single row for the Risk – BCM – 5 – Assess Risk form.
- We have simplified and enhanced the Workflows by applying the following changes:
 - Rename triggers and state names:
 - Business Impact Analysis (assessment)
 - Changed Scope BIA to Define Scope
 - Changed Send to Champion to Start
 - Changed Analyze BIA to In Progress (Analyze)
 - Changed Process & Risk Assessment Complete to Complete
 - Changed Return to Scope BIA to Return to Define Scope
 - Changed Manage BIA to In Progress (Manage)
 - Changed Continuity Strategies Created to Complete
 - Changed Return to Analyze BIA to Return to Analyze
 - Changed Define Plan to In Progress (Plan)
 - Changed Plans Created to Complete
 - Changed Return to Manage BIA to Return to Manage
 - Changed Exercise Plan to In Progress (Exercise)
 - Changed Exercise Complete to Complete
 - Changed Return to Define Plan to Return to Plan
 - Changed Monitor BIA to Monitor
 - Changed Reassess BIA to Reassess
 - Changed Archive BIA to Archive
 - Changed Return to Exercise Plan to Return to Exercise
 - Changed Archived BIA to Archived
 - Changed Return to Monitor BIA to Return to Monitor
 - Process (Business Impact Analysis – Process Workflow):

- Changed Assessment Not Started to Not Started
 - Changed OE: Start Process Assessment to OE: Start
 - Changed Assessment in Progress to Assess Process
 - Changed Assessment Complete to Monitor Process
 - Changed Reassess Process to Reassess
 - Changed OE: Reassess Process to OE: Reassess
 - Changed Assessment Archived to Archived Process
- Realign the Activation button
 - Workflow
 - Continuity Strategy
 - Plan
 - Changed the color of the Activate trigger to red
 - Forms
 - Plan – BCM – Main
 - Continuity Strategy – BCM – Main
 - Moved the Active button to the middle on the last card.
- The following changes were made to prevent the creation of orphaned objects:
 - Renamed the following forms
 - The Process – GRC – 1 – Library form was renamed to Process – GRC – 2 – Library
 - The Process – Create form was renamed to Process – GRC – 1 – Create
 - Disabled the Create function on the Process – GRC – 1 – Create form
 - Selected the Process Library as a required component on the Process Workflow Create state
- Added the Due Date and Review Date fields on the Business Impact Analysis – BCM – Main form and linked them to the **Home** screen.
- BC Team, BC Champion, CS Owner, and Plan Owner permissions were updated to include access to key resources (e.g., people, assets, locations, third parties, products, and business units) and issue assignments permissions.
- The following forms have been realigned to conform with internal design practices and standardized field usage:
 - The **Creation** button was moved to the first card on the Business Impact Analysis – BCM – Main form.
 - The Business Impact Analysis – Nav (Assessment Scope) form was renamed to Business Impact Analysis – Nav (Assessment Scoping with Sub Process).
 - Created a new navigation form called Business Impact Analysis – Nav (Assessment Scoping).
 - Change the form that appears after selecting the **Define Scope of** button on the

Business Impact Analysis – BCM – Main form to the Business Impact Analysis – Nav (Assessment Scoping form).

- The property name was removed from the following forms, but is an editable field on the form's header, unless in creation, review, or with concatenation:
 - Business Impact Analysis – BCM – Main
 - Process – BCM – 1 – Analyze
 - Process – BCM – 2 – Manage
 - Process – BCM – 3 – Plan & Exercise
 - Process – BCM – 4 – Monitor & Archive
 - Risk – BCM – 3 – Library
 - Risk – BCM – 4 – Assign Risk Owner
 - Location – BCM – Overview
 - Person – BCM – Overview
 - Third-Party – BCM – Overview
 - Loss Event – BCM – Main
 - Requirements – BCM – 1 – Library
 - Continuity Strategy – BCM – Main
 - Plan – BCM – Main
- The following relationship tables were updated:
 - The Sub Process and Product relationship tables were updated on the following forms:
 - Process – BCM – 1 – Analyze
 - Process – BCM – 2 – Manage
 - Process – BCM – 3 – Plan & Exercise
 - Process – BCM – 4 – Monitor & Archive
 - The Process relationship table was updated on the following forms:
 - Risk – BCM – 1b – Create (BCM Team)
 - Risk – BCM – 2 Risk Review
 - Risk – BCM – 3 Library
 - Risk – BCM – 4 – Assign Risk Owner
 - Risk – BCM – 5 – Assess Risk
- Moved the Issues section from a separate card to a tab after the Risk Response tab on the Risk – BCM – 5 – Assess Risk form.
- Added section titles to formula cards on the following forms:
 - Added Business Impact Analysis – BCM – Main title to the third card on the Business Impact Analysis – Main form.
 - Added Process Ratings section title to the first card on the following forms:
 - Process – BCM – 1 – Analyze

- Process – BCM – 2 – Manage
- Process – BCM – 3 – Plan & Exercise
- Process – BCM – 4 – Monitor & Archive
- Updated relationship table columns to reflect elements on the forms:
 - Added the Risk Owner to the Risk Details card on the RISK – BCM – 5 – Access Risk form.
 - Displayed the hidden Risk Ownership tab on the Risk – BCM – 3 – Library form.
 - Hidden fields on the first card on the Third-Party – BCM - Overview form were unhidden, except for the **Comments** field, and the **Third-Party Company/Business Name** field was removed.
 - The following changes were made to the Process – BCM – 1 – Analyze, Process – BCM – 2- Mange, Process – BCM – 3 – Plan & Exercise, and Process – BCM – 4 – Monitor & Archive forms
 - Removed the **Third Parties Involved in Delivery** field and added customer segments to the Products tab on the Dependencies card.
 - Removed the **Street Address, City, and Country** fields and added **Location Property** field to the Location tab on the Resources card.
 - Removed the **First Name, Last Name, Email 1, and Phone Number** fields and added **Name Property, Person Type, and Employment Status** fields to the Person tab on the Resources card.
 - Removed the **Risk Level** and **Relationship Owner** fields from the Third-Party card on the Resources card.
- Improved the application’s navigation by hiding views that have no data by default and updating the process library navigation form.
- Applied enhancements to all the BCM reports to ensure accurate data sources, workflows, and roles, allowing users to generate reliable reports:
 - Updated Heat Maps and Risk Metrics formatting
 - Consolidate Data Visualizations and Dashboards
 - Added the Recovery Team role to the Plan Summary report
 - Remove filters that can unintentionally hide data
 - Moved reports from views to new report activities
 - Fixed an issue where data was not displaying due to technical limitations
 - Updated all tables to include only assessment data
 - Removed library data from the monitoring report
- Enhanced the Dashboards by applying consistent color coding to chart assets.
- Fixed minor issues with the sample data.

All Applications

- Application Data import files were updated to match the Risk Management Data Import file (unless otherwise stated), creating an integrated story across the GRC suite of applications.
- Created two new dashboard views to include all GRC application data, allowing users to view all GRC data in one place.
 - GRC Executive Dashboard
 - GRC Management Dashboard
- Applied changes to form design across all GRC applications to ensure that all forms follow a consistent standard, creating a better user experience.
- Enabled View Latest Update on the following forms:
 - Requirement - CM - 1a - Library (New/Updated Requirement): Automatically enable the view latest updates toggle when opening this form
 - Requirement - CM - 2 - Risk Assessment
 - Requirement - CM - 1 - Library
 - Requirement Detail - Library
 - Requirement Detail - Library (New/Updated Requirement)
 - Requirement Detail - New/Updated Requirement
 - Control - GRC - 2 - Control Self-Assessment
 - Risk - RM - 5a - Assess Risk
 - Risk - RM - 5c - Assess Risk (Step by Step)
 - Internal Audit Project - 3 - Fieldwork, Reporting, Complete and Archive
 - Internal Audit Project - 2- Planning Memo
 - Process - IA - Process Overview
 - Risk - IA - Risk Overview
 - Control - IA - Testing Working Paper
 - Test - IA - Testing Working Paper
 - IC - Financial Statement Account Overview
 - IC - Financial Statement Sub Account Overview
 - Process - IC - 1 - Process Overview
 - Process - IC - 2 - Process Owner Overview
 - Sub Process - IC - Overview
 - Control - IC - 2a - Control Walkthrough and Testing
 - Request - IA & IC - 1 - Auditor
 - Policy - GRC - Overview - Policy Reviewer
 - Citation - IT Compliance - 3 - Internal Assessment
 - Control - IT Risk & Compliance - 3 - Assessment
 - Control - GRC - 1 - Library
 - Control - GRC - Report (Pallet)
 - Control - IA - Audit Client Overview

- Control - IA - Document Requests (Pallet)
- Control - IC - 2b - Document Requests (Pallet)
- Control - IC - 3 - Control Owner Overview
- Control - IC - 5 - External Auditor Overview
- Control - IT Risk & Compliance - 2 - IT Control Owner Assignment
- Issue - GRC - Overview
 - Corrective Action - GRC - Overview