

Version 23.3ab Release Notes (Risk Management)

Last Modified on 12/15/2023 10:59 am EST

Improvements

- Ovals were enabled for Formulas on the Third-Party Assessment – Third-Party Contact – Consolidation form.
- The GRC – 3 -Assign Control Owner email template for the Control Self Assessment Workflow was reconfigured.
- We redesigned the Risk Register – RM – Review Form by:
 - Read Only was removed from the Object Name.
 - The Risk Register Name field was removed.
 - Record Properties were removed.
 - The Create option from the Relationship Data table was removed.
 - Form sections separate by Card.
 - The Relationship Data tab was added.
 - A description explaining the Form sections was added.
 - Objectives and Processes were added to the Relationship Data.
 - The Archive trigger was moved to the left side of the Form.
- We redesigned the Risk Category – RM – Library and Risk Subcategory – RM – Library Forms by:
 - The Custom Name was removed, and the Object Name was enabled.
 - The Risk Category Name field was removed from the Form.
 - Record Properties were removed from the Form.
 - Risk Register was added to the Risk Category Details section.
 - Form sections separate by Card.
 - The Relationship Data tab was added.
 - Form section descriptions were added to the Form.
 - The Archive trigger was moved to the left side of the Form.
- We redesigned the Risk – RM – 3 - Library Form by:
 - The Custom Name was removed, and the Object Name was enabled.
 - Record Properties were removed from the Form.
 - Change the Risk Ownership section to a tab.
 - Form sections separate by Card.
 - The Relationship Data tab was added to the Form.
 - The Archive trigger was moved to the left side of the Form.
- We redesigned the Process Library – IRM – 3 - Edit Form by:
 - The Custom Name was removed, and the Object Name was enabled.

- Record Properties were removed from the Form.
- Form sections separate by Card.
- Form section descriptions were added to the Form.
- The Archive trigger was moved to the left side of the Form.
- Change the Forms format to the left side column.
- Change the Relationship Data section to a tab.
- We redesigned the Process Library – IRM – 3 - Edit Form by:
 - The Custom Name was removed, and the Object Name was enabled.
 - Record Properties were removed from the Form.
 - Form sections separate by Card.
 - Form section descriptions were added to the Form.
 - The Archive trigger was moved to the left side of the Form.
 - Change the Relationship Data section to a tab.
 - Reports separated by Cards.
- We redesigned the Sub Process – GRC – Library Form by:
 - The Custom Name was removed, and the Object Name was enabled.
 - Record Properties were removed from the Form.
 - Change the Relationship Data section to a tab.
 - Form sections separate by Card.
 - Form section descriptions were added to the Form.
 - The Archive trigger was moved to the left side of the Form.
- We redesigned the Objective – RM – Library Form by:
 - The Custom Name was removed, and the Object Name was enabled.
 - Record Properties were removed from the Form.
 - Form sections separate by Card.
 - Form section descriptions were added to the Form.
 - The Archive trigger was moved to the left side of the Form.
 - Change the Relationship Data section to a tab.
 - Reports separated by Cards.
- We redesigned the Control – GRC – 1 – Library Form by:
 - The Custom Name was removed, and the Object Name was enabled.
 - Record Properties were removed from the Form.
 - Form sections separate by Card.
 - Form section descriptions were added to the Form.
 - The Archive trigger was moved to the left side of the Form.
 - Change the Relationship Data section to a tab.
 - Reports separated by Cards.
 - Change the Forms format to the left side column.

- We redesigned the Policy – GRC – Overview – Policy Reviewer Form by:
 - The Custom Name was removed, and the Object Name was enabled.
 - Record Properties were removed from the Form.
 - Form sections separate by Card.
 - Form section descriptions were added to the Form.
 - The Archive trigger was moved to the left side of the Form.
 - Change the Relationship Data section to a tab.
 - Reports separated by Cards.
- We redesigned the Policy – GRC – Overview – Policy Owner Form by:
 - Read Only was removed from the Object Name.
 - Record Properties were removed from the Form.
 - Change the Forms format to the left side column.
 - Form sections separate by Card.
 - Change the Relationship Data section to a tab.
- We redesigned the Contributing Factor – RM – Overview Form by:
 - The Custom Name was removed, and the Object Name was enabled.
 - Change the Forms format to the left side column.
 - Form sections separate by Card.
 - Updated Formulas on the Formula Cards.
 - New Formulas Added:
 - Net Loss – Incident
 - Net Loss – Loss Even
 - Total Loss
 - Total Incident & Loss Prevention
- Record Properties were removed from the Form.
- Change the Relationship Data section to a tab.
- We redesigned the Regulator – CM – Library Form by:
 - Read Only was removed from the Object Name.
 - The Custom Name was removed, and the Object Name was enabled.
 - The Report and Grid placements within the Form were improved.
 - Form sections separate by Card.
 - Change the Relationship Data section to a tab.
 - The Archive trigger was moved to the left side of the Form.
- We redesigned the Loss Event – RM – 3- Lost Event Overview and Loss Event – RM – 2 – Triage Forms by:
 - Change the Forms format to the left side column.
 - Form sections separate by Card.
 - The Archive trigger was moved to the left side of the Form.

- Improved the placement of the Formulas on the Form.
- We redesigned the Loss Event – RM – 3a- Lost Event Overview Form by:
 - Change the Forms format to the left side column.
 - Form sections separate by Card.
- We redesigned the Business Unit – GRC – Overview Form by:
 - The Custom Name was removed, and the Object Name was enabled.
 - Form sections separate by Card.
 - Record Properties were removed from the Form.
 - Change the Relationship Data section to a tab.
 - IT Risk Assessment and IT Compliance Assessment Relationship tables were added to the Form.
- We redesigned the Loss or Recovery – RM – Loss Event Form by:
 - Increase the size of the Name and Description sections to 75%
 - Form sections separate by Card.
 - Change the Relationship Data section to a tab.
 - Hid the Relationship Data tables when creating the Loss or Recovery event.
- We replaced the word Dashboard with Overview on the following RM – reports:
 - RM – First Line Risk Dashboard report
 - RM – First Line Risk Dashboard (Objective Risk Assessment) report
 - RM – First Line Risk Dashboard (Process) report
- We removed the word Dashboard on all the Report and Portal views to Overview.
- Formula Ovals were enabled on all ERM Forms.
- An Executive Dashboard was added to the Dashboard feature to outline the current status of Enterprise Risk Management.