

MITR^TECH | PolicyHub

Welcome to your 2023 PolicyHub User Group!



Agenda

- Opening Remarks & Introductions
- Recent Enhancements & Roadmap
- Optimizing your Investment
- Q&A

Meet the Team



Chris Priest

PolicyHub
Product Manager



Natalie Wilson

Technical Support,
Product Lead



Morgan Miller

Global Head of GRC
Sales

MITRATECH

Harness Integrated Technology to Drive Unmatched Collaboration & Efficiency

CORPORATE LEGAL & CLAIMS

General Counsel | Legal Operations | Contracts

Matter Management

Spend Management &
Analytics

Managed Bill Review

Contract Management

Firm & Panel Management

Legal Hold

HUMAN RESOURCES COMPLIANCE

CHRO | Talent Acquisition Leaders | VP HR Compliance

I-9 Management

Background Screening

Hourly Talent Acquisition

Immigration Case
Management

OFCCP Compliance & DEI Strategy

Performance Management
& Talent Development

GOVERNANCE, RISK & COMPLIANCE

Chief Risk/Compliance Ofc. | CISO | Chief Procurement

Policy Management

EUC & Model Risk Management

Obligations & Incident Management

Alyne

- Cyber Security Management
- Data Privacy
- Third-Party Risk
- Internal Controls
- IT Risk
- ESG
- Info Governance

ENTERPRISE WORKFLOW AUTOMATION

INTERACT x MITRATECH

WE'RE LETTING THE GOOD TIMES ROLL... ALL THE WAY TO NOLA!

Interact 2023

New Orleans

MITRATECH | THE ROOSEVELT, NEW ORLEANS | OCT. 2-5, 2023

GET 2.5 DAYS OF EXCLUSIVE INSIGHTS, ONGOING TECH EXPO ACCESS, AND IMMERSIVE TRAINING

REGISTER TODAY WITH PROMO CODE "GRCUserGroup" >



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Recent Enhancements & Roadmap



PolicyHub 5.5

Third-Party Policy Management

- Manual user / group management
- User synchronisation via API
- Third-party authentication

Other Enhancements

- Dedicated PDF viewer
- Option to prevent users from downloading policies
- Hyperlink improvements
- Synchronize users and see sync status in UI



PolicyHub 5.6

Collaborative Editing

- Browser-based Document Editing
- Collaborative Workflows
- Full Workflow History in the Inbox
- Collaborative Reporting

Other Enhancements

- Android Support
- iPhone Support
- 5 New Languages Supported in the Inbox (Hindi, Hungarian, Kannada, Punjabi, Tamil)





Upgrade Process

On Premise Clients

- Collaborative Editing only available for Hosted Clients
- Please contact your Account Manager in the first instance

Hosted Clients

- Upgrade programme to proactively contact clients over the coming months
- Log a ticket with support to request an upgrade outside of the programme

THEMES

Core

PROJECTS

UI Enhancements

Document Views Report

Permission Change Report

BUSINESS VALUE

 In Discovery In active development Completed

Enhancement to Inbox UI and Admin UI. To take the user experience to the next level

Report on who is viewing policies. This is a great way to measure how useful certain policies are

Report on who has changed any user permissions. This can save a lot of time during audits and gives you full traceability

Integration

SharePoint Integration

Search for policies from the comfort of your SharePoint site. Users in many organizations are used to going to SharePoint for all of their documentation. This will enable them to search for and retrieve policies in the same way as any other document

Tech Updates

SQL Server 2022 Support

Performance Improvements

Support for SQL 2022 on the PolicyHub server. For on-prem clients that want to stay up to date with the latest Microsoft SQL Server version

Strong focus on performance for larger systems. To ensure a first class user experience at any scale

Note - The information above should not be construed as a commitment of delivery, timing, or scope. These are our current plans, but our roadmaps are subject to continuous change.

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A Live Walkthrough

- *Best Practice*
- *Tips & Tricks*



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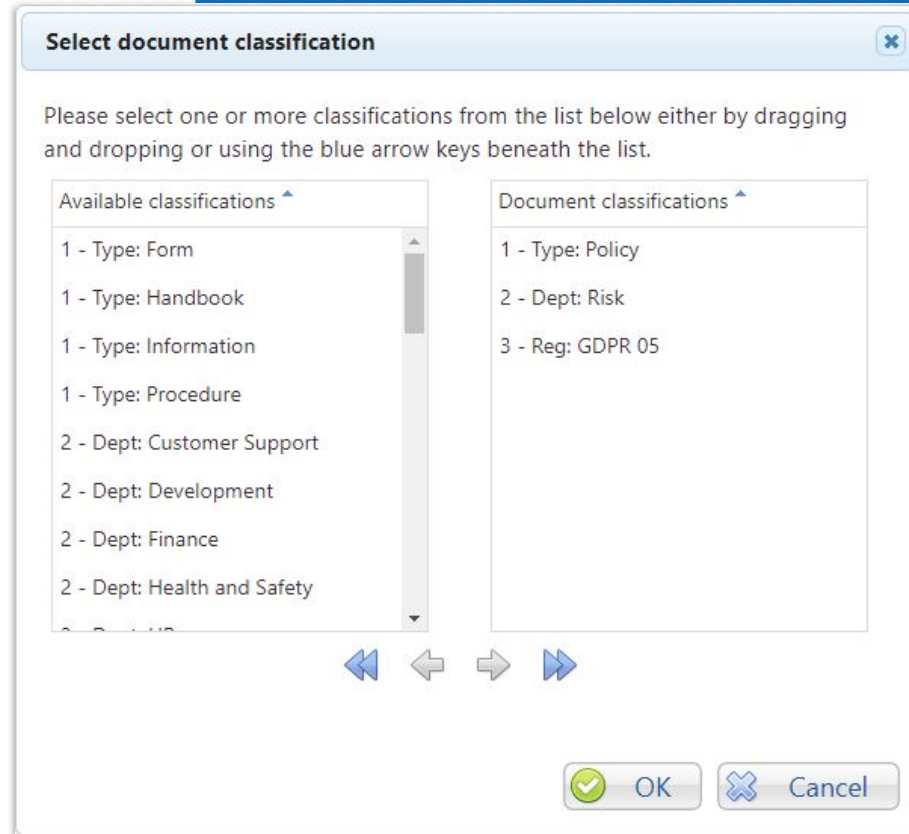
Library



Classifications

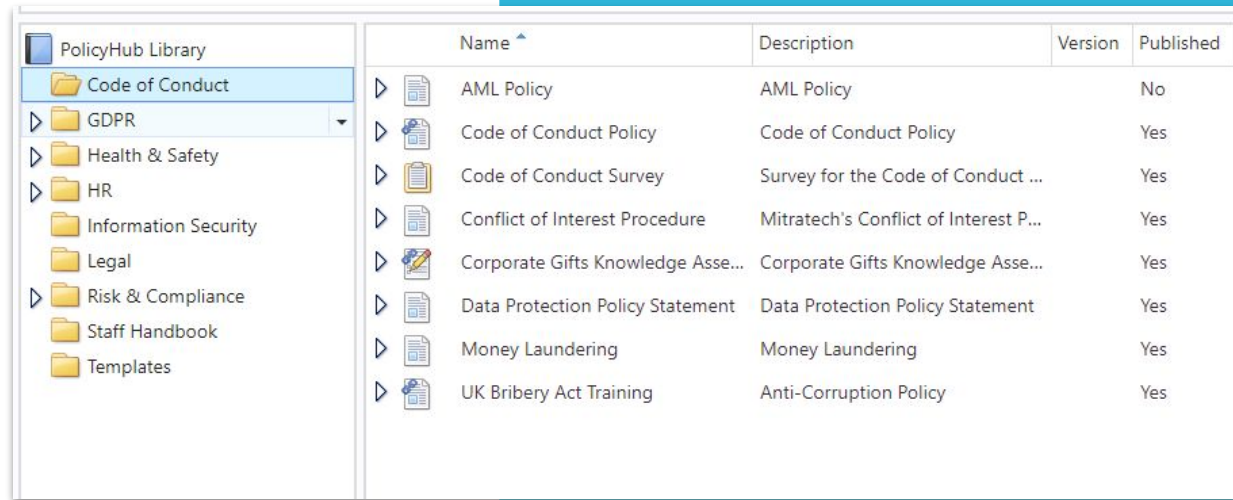
- Tag documents with multiple flags
- Searching available for admins and end users
- Contact support to manage list

[Classifications Quick Reference Guide](#)



Folder Structure

- Keep it simple
- Think about how it works for end users
- Plan any restructure

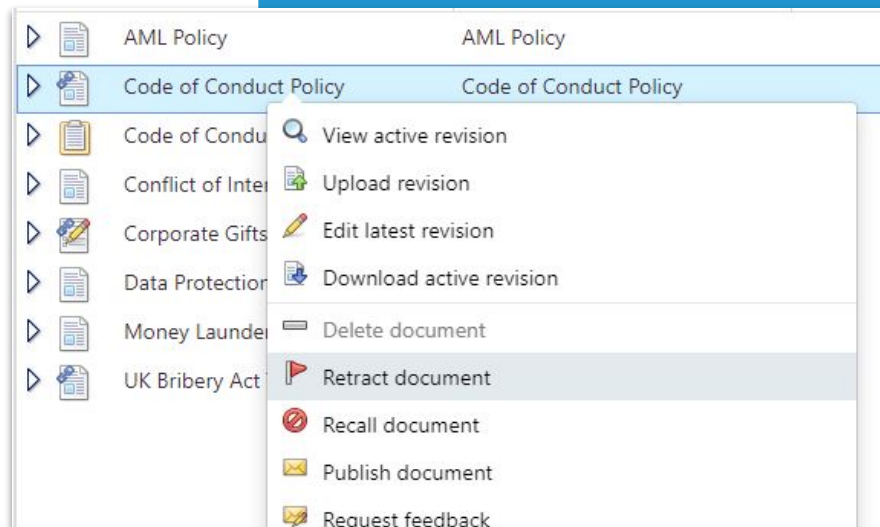


The image shows a screenshot of a file explorer interface. On the left, a tree view shows the 'PolicyHub Library' with several folders: Code of Conduct, GDPR, Health & Safety, HR, Information Security, Legal, Risk & Compliance, Staff Handbook, and Templates. The 'Code of Conduct' folder is selected. On the right, a table lists documents with columns for Name, Description, Version, and Published.

Name ^	Description	Version	Published
▶ AML Policy	AML Policy		No
▶ Code of Conduct Policy	Code of Conduct Policy		Yes
▶ Code of Conduct Survey	Survey for the Code of Conduct ...		Yes
▶ Conflict of Interest Procedure	Mitratch's Conflict of Interest P...		Yes
▶ Corporate Gifts Knowledge Asse...	Corporate Gifts Knowledge Asse...		Yes
▶ Data Protection Policy Statement	Data Protection Policy Statement		Yes
▶ Money Laundering	Money Laundering		Yes
▶ UK Bribery Act Training	Anti-Corruption Policy		Yes

Retracting

- Retract at different levels:
 - Document
 - Publication
 - Version
- Update document name to reflect retraction
- Move to an 'archive' folder



Hyperlinks

- Easily move between related documents
- Hyperlink always goes to latest published version

Data Breach Policy

Please click [here](#) to see the Procedure for Data Breaches

<https://salessaasdemo.policyhub.com/PolicyHub/DocumentViewer.aspx?Document=643&ResolveRevision=1&Redirect=1>

I. Incident Management

1. Client Technical operations and the Hosting Team must establish a “Security Incident Response Team” (SIRT) responsible for coordinating, responding and reporting on data breaches.
2. They must define the roles and responsibilities of SIRT which can take priority over normal duties in the event of an incident.
3. SIRT must include members from the following departments:

3. Support













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Publishing



Housekeeping DTNU

- DTNU works with recipient lists that contain user group(s)
- Remember to switch off distribute to new user on previous attestation publications

Publications list									
Publication name	Description	Source	On behalf of	Creation date	Publication date	Publication type	Distribute to new u...	Automatic retraction	Escalat
 Example Data Brea...	Example Data Brea...	Compliance Office	DPO	4/25/2023, 2:53:10 ...	4/25/2023, 2:53:10 ...	Compliance request	Yes	No	
 Data Breach Policy ...	Example Data Brea...	Compliance Office	DPO	6/21/2022, 3:06:34 ...	6/21/2022, 3:06:34 ...	Compliance request	Yes	No	
 Data Breach Policy	Example Data Brea...	Compliance Office	DPO	3/30/2022, 7:28:15 ...	3/30/2022, 7:28:16 ...	Compliance request			 View publication
 Data Breach Policy	Example Data Brea...	Compliance Office	DPO	3/2/2022, 11:42:02 ...	3/2/2022, 11:42:02 ...	Compliance request			 Copy publication
 Data Breach Policy	Example Data Brea...	Compliance Office	DPO	2/28/2022, 1:42:25 ...	2/28/2022, 1:42:25 ...	Compliance request			 Delete publication
 Data Breach Policy	Example Data Brea...	Compliance Office	DPO	2/28/2022, 10:30:0...	2/28/2022, 10:30:0...	Compliance request			 Send publication
 Data Breach Policy	Example Data Brea...	Compliance Office	DPO	1/17/2022, 9:51:54 ...	1/17/2022, 9:51:54 ...	Compliance request			 Don't distribute to new users

[Distribute to New User Best Practice Guide](#)

Recipient List Priority

- Used when a person appears in more than one recipient list
- Increasing the priority tells PolicyHub which rule to use for that person




Intended recipients			
Name ^	Description	Publication rule	Priority
 All Managers - UK	All Managers based in UK	Complete within 2 weeks 	Low
 All Managers	All Mitratech Managers	Publish directly into user library without notification 	Normal
			High
			Critical

 Add recipients

[Recipient List Priority Reference Guide](#)

Exclude Rule

- Built-in system rule
- Allows you to exclude relevant people from a publication
- Build a recipient list of the people you want to exclude

Intended recipients			
Name ^	Description	Publication rule	Priority
 Sales	Sales	Exclude rule 	High
 All Employees	All Employees	Read in 1 week, daily reminders 	Normal

[Excluding Users How To Video](#)

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Reporting



Compliance Overview

- Understand the compliance status for a group of people or the whole organisation

The screenshot displays a software interface with two main panels. The left panel, titled 'Groups and Roles', shows a hierarchical tree structure. The 'Mitratech' group is selected, and a context menu is open over it, listing several actions: 'View compliance report showing all publications sent to this group', 'View publication audit report for this group', 'View library item audit report for this group', 'View standout answers report for this group', and 'View compliance overview report for this group'. The right panel, titled 'Users (0)', shows a table with columns for 'First name' and 'Surname', but it is currently empty.

Filters

- Use the filters to search against particular criteria
- Concentrate on the most important information

Publication Status - Equals (Multiple) ...
In Progress
Completed
Retracted
Recalled

User Status - Equals (Multiple) ...
Active
Inactive
Disabled

Date Sent From - Equals (Calendar)

Date Sent To - Equals (Calendar)

Date Actioned From - Equals (Calendar)

Date Actioned To - Equals (Calendar)

Compliance Only - Equals (Select)
Yes

Compliance - Equals (Select)
...
Complied
In Progress
Not Complied

Filters Fields

Update results

Subscriptions

- Get compliance information to the right people at the right time
- Automate the distribution of reports
- Create a schedule, including an end date if applicable

[Subscriptions Quick Reference Guide](#)

User Compliance Overview

Subscription name
Overall Organizational Compliance

Send the report by email to a server file share

To Cc
natalie.wilson@mitratech.com; To ▾

Subject
Overall Organizational Compliance

Email comment
Email comment

Include report as a link and / or file attachment
Excel ▾

Schedule the subscription hourly daily weekly monthly yearly once

Repeat after a set number of week(s)
- 1 +

On the following day(s)
 Monday Tuesday Wednesday Thursday
 Friday Saturday Sunday

Starting on and ending on (optional)
06/01/2023 10:00 and ending on (optional)

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Online Resources



Client Success Portal

- What's New
- Training Videos
- Knowledgebase
- Webinars
- Release Information
- Ideas Portal

success.mitratech.com

The screenshot displays the PolicyHub Client Success Portal. At the top, the title "PolicyHub" is centered. Below it, a message reads: "Please see the Welcome to the New Mitratech Help Site page for details on how to best leverage this site's features for answering your questions quickly and efficiently." The main content area is organized into a grid of six categories, each with an icon and a list of links:

- What's New**: Includes links for Roles and Permissions, Publishing a Document for Feedback, Perform User Synchronization, User Management - Processing Membership Changes, PolicyHub v5.6 Release Highlights, Including Workflow, Publishing - Excluding Previous Recipients, Workflow - Review History, Workflow Collaborative Editing - Workflow Walkthrough, Publish Type: Choosing the correct option, Reporting - Workflows, Categories, and Manual Users and Groups.
- Training Videos**: Represented by a video camera icon.
- Best Practice Guidance**: Represented by a checkmark icon.
- Quick Reference Guides**: Represented by a document icon.
- How To Videos**: Represented by a video camera icon.
- Release Information**: Represented by a document icon.
- Webinars**: Represented by a computer monitor icon.

At the bottom left, under "Support Direct Lines", contact information is provided: UK: +44 20 4506 6817 and USA: +1 737 232 4265. The footer contains three buttons: "Ideas Portal", "Support Portal", and "Client Support Video".

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Q&A



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Contact Us

info@mitratech.com

Mitratech US

+1 (512) 382.7322

Mitratech EMEA

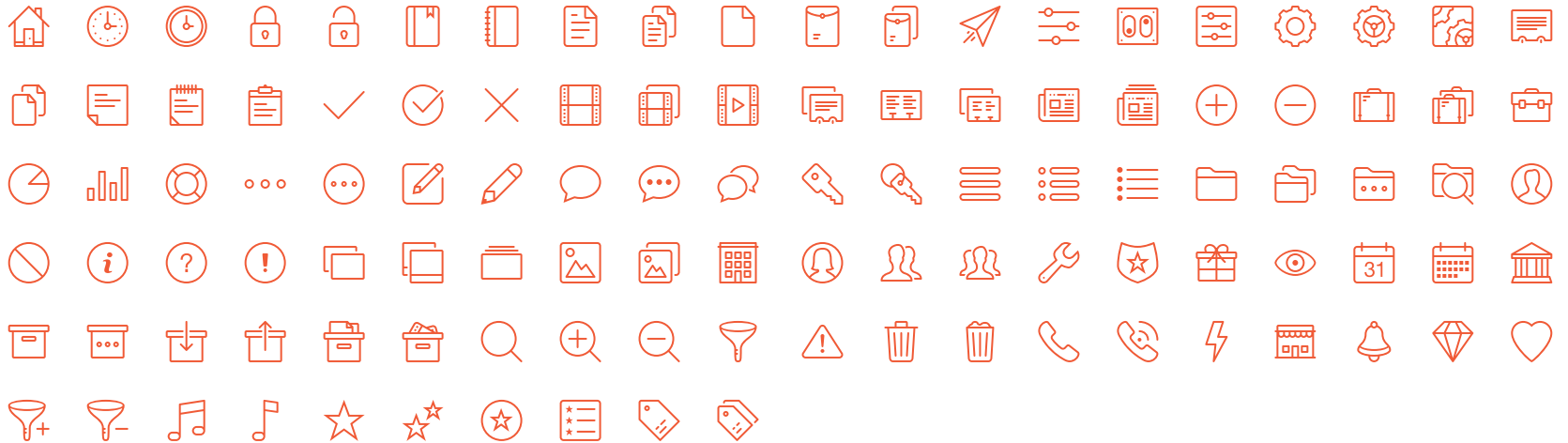
+44 (0) 1628.600.900

Mitratech AUS

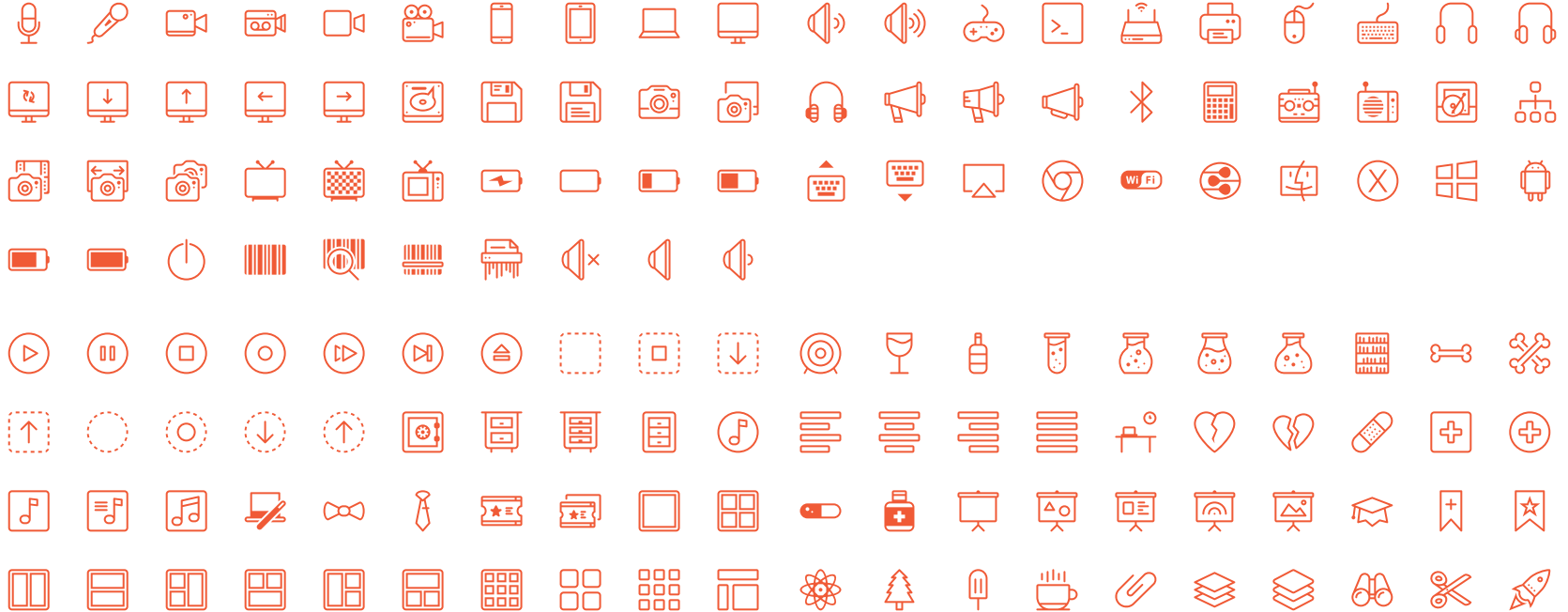
+61 (0)3.9521.7077



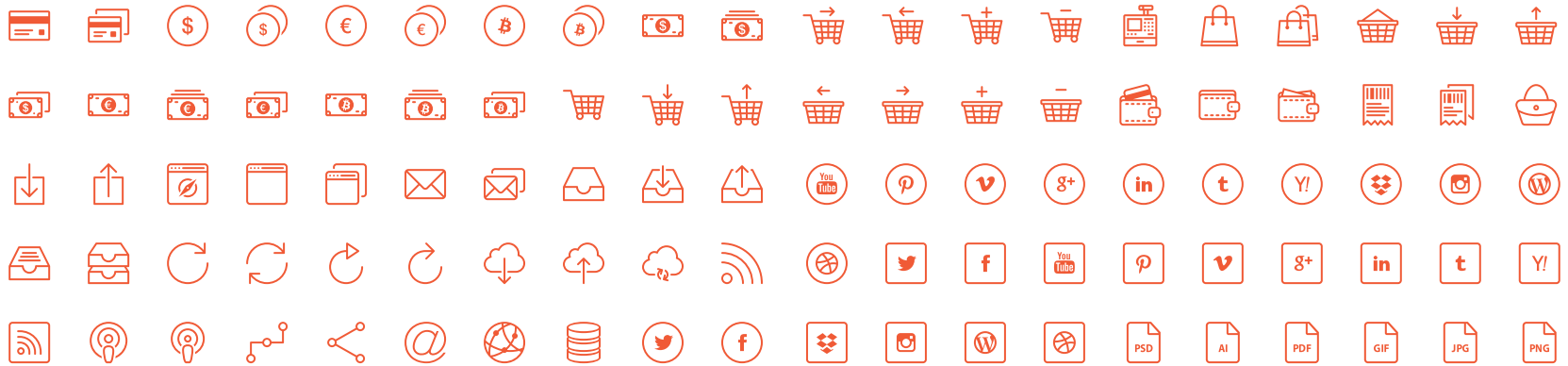
1. Select icon. 2. Copy + paste into your slide. 3. Change fill color as needed.



Select icon. Copy + paste into your slide. Change fill color as needed.



1. Select icon. 2. Copy + paste into your slide. 3. Change fill color as needed.



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