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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

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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

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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

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FY24 PolicyHub Product Themes

In Discovery | In active development | Completed

THEMES	PROJECTS	BUSINESS VALUE
Core	UI Enhancements	**Enhancement to Inbox UI and Admin UI.** To take the user experience to the next level
	Document Views Report	**Report on who is viewing policies.** This is a great way to measure how useful certain policies are
	Permission Change Report	**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	**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
	Performance Improvements	**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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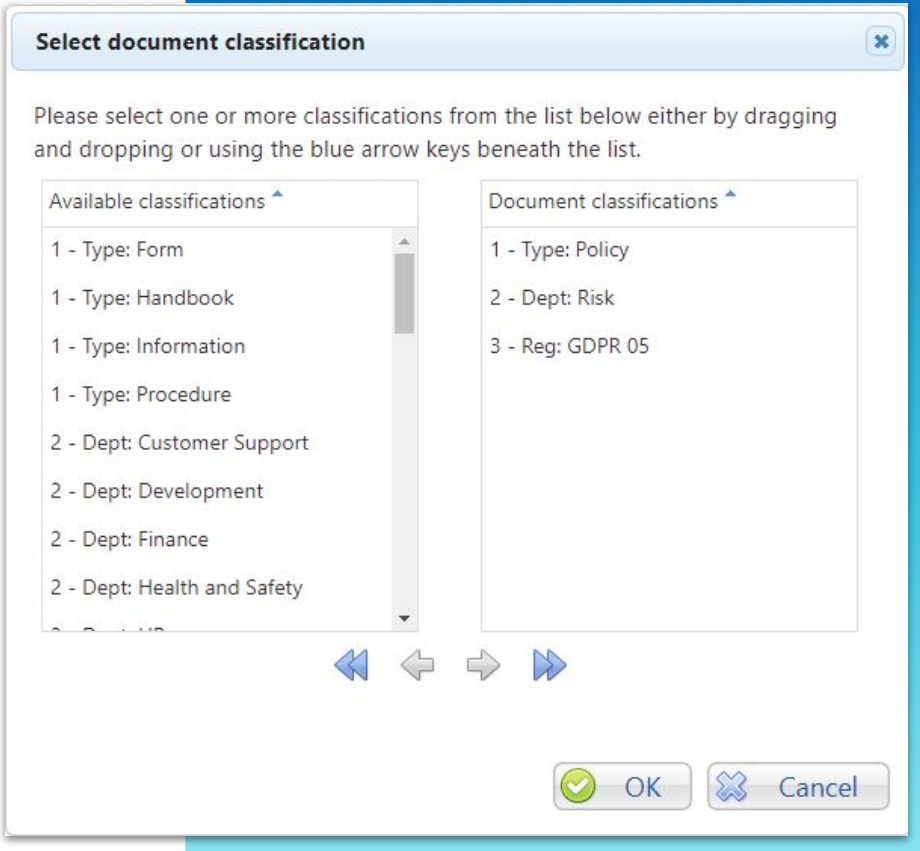
Library

Classifications

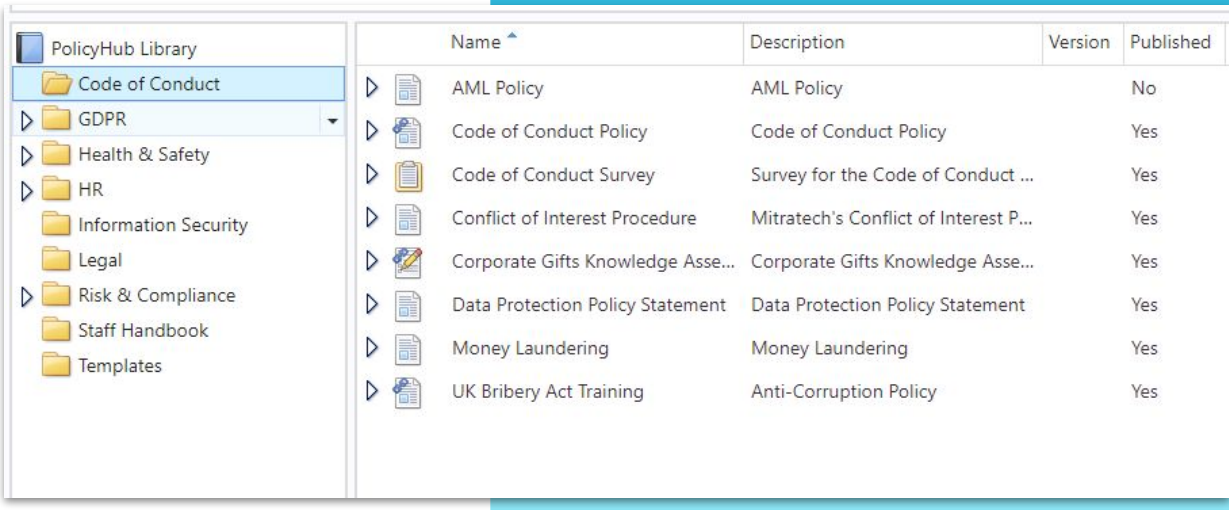
- Tag documents with multiple flags
- Searching available for admins and end users
- Contact support to manage list



Classifications Quick Reference Guide

Folder Structure

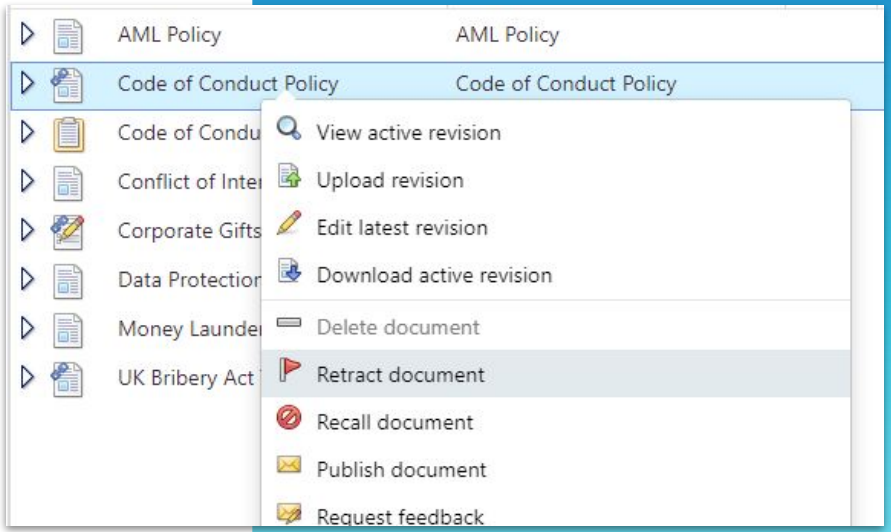
- Keep it simple
- Think about how it works for end users
- Plan any restructure



Folder Structure Quick Reference Guide

Retracting

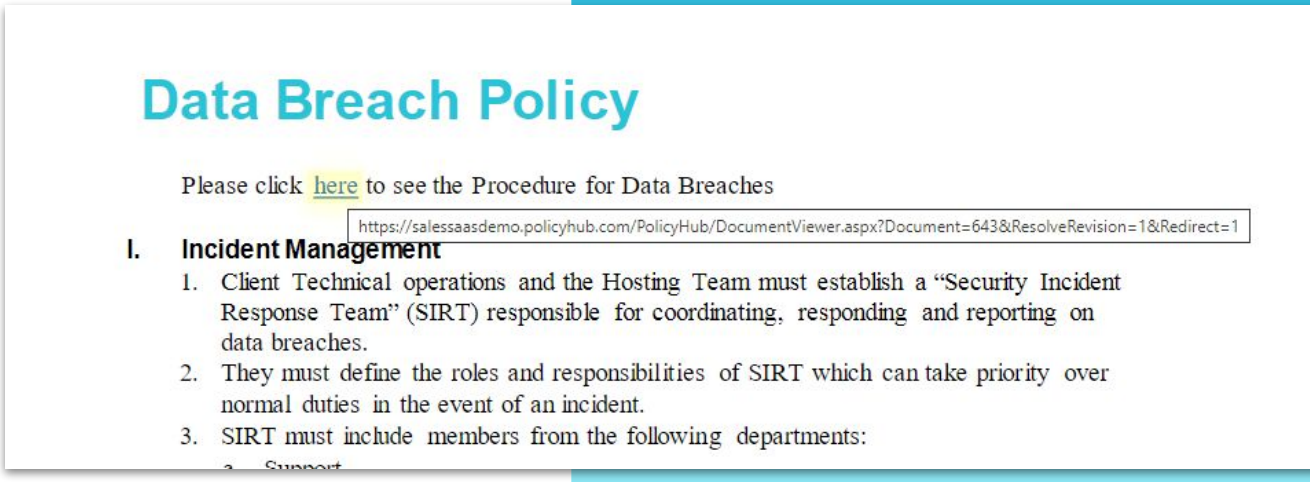
- Retract at different levels:
  - Document
  - Publication
  - Version
- Update document name to reflect retraction
- Move to an ‘archive’ folder



Retraction Quick Reference Guide

Hyperlinks

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



Hyperlink Quick Reference Guide

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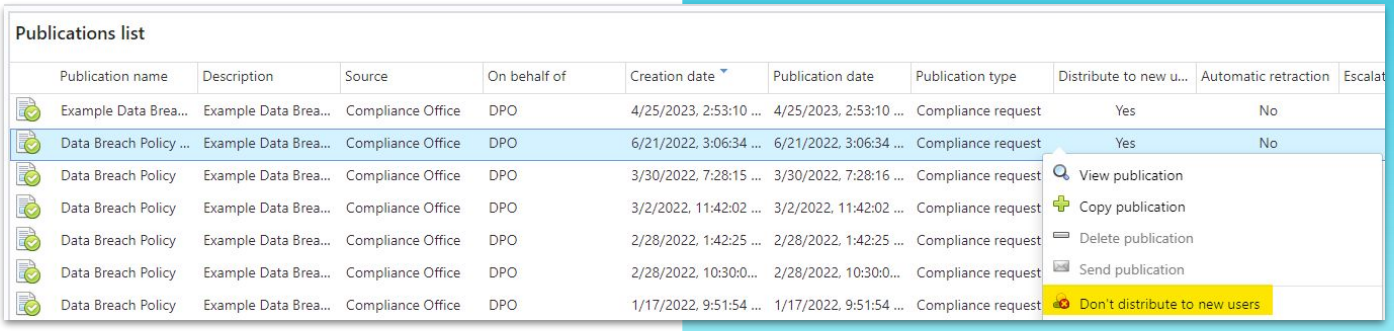
Publishing

Housekeeping DTNU

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



[Distribute to New User Best Practice Guide]

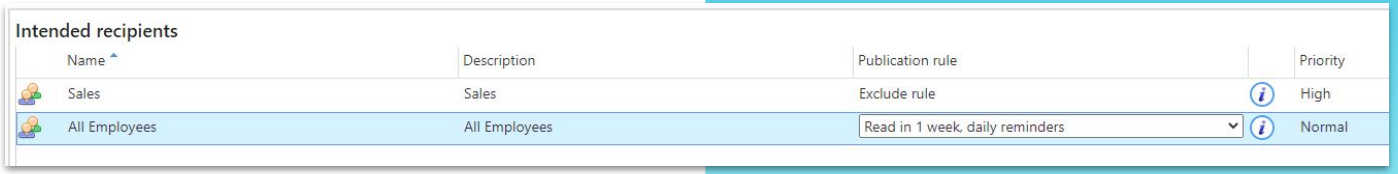
Recipient List Priority

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

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



Excluding Users How To Video

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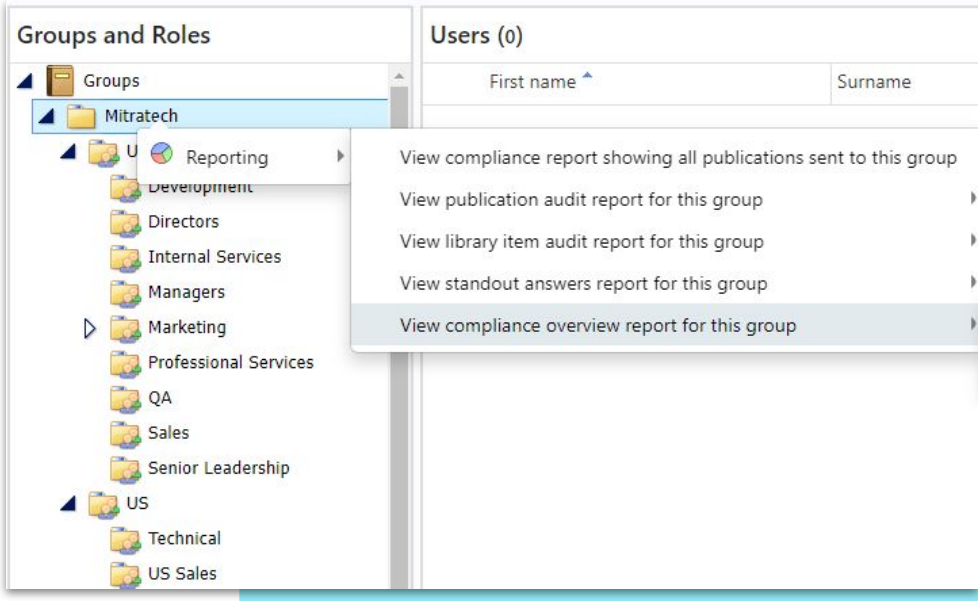
Reporting

Compliance Overview

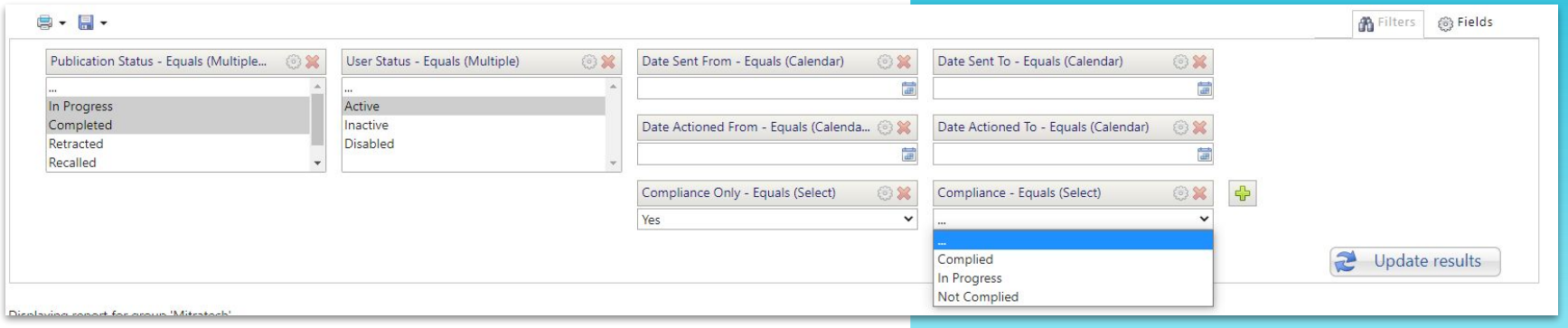
- Understand the compliance status for a group of people or the whole organisation



User Compliance Overview Quick Reference Guide

Filters

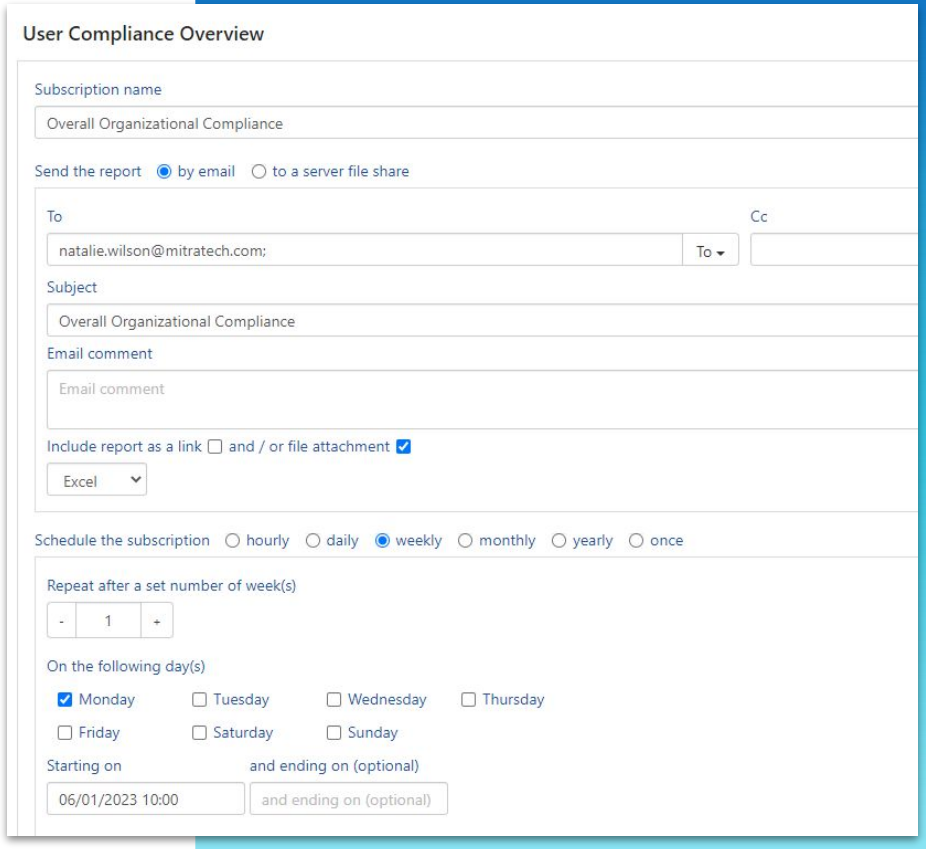
- Use the filters to search against particular criteria
- Concentrate on the most important information



[Report Filters Quick Reference Guide]

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

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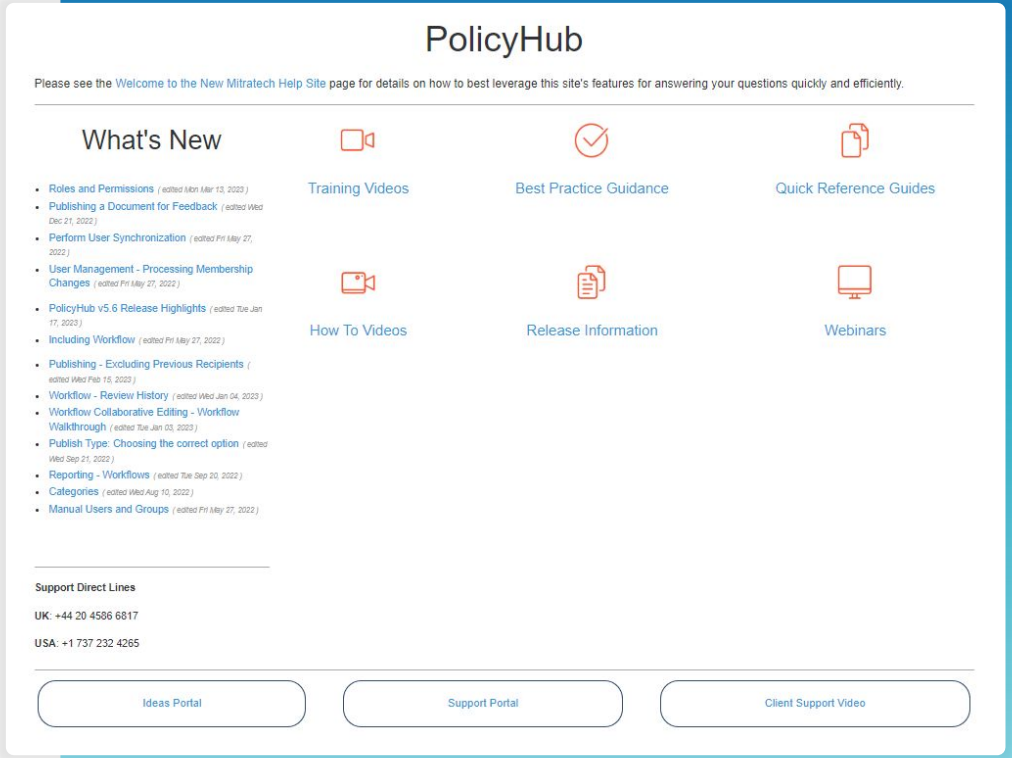
Online Resources

Client Success Portal

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

success.mitratech.com



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Q&A

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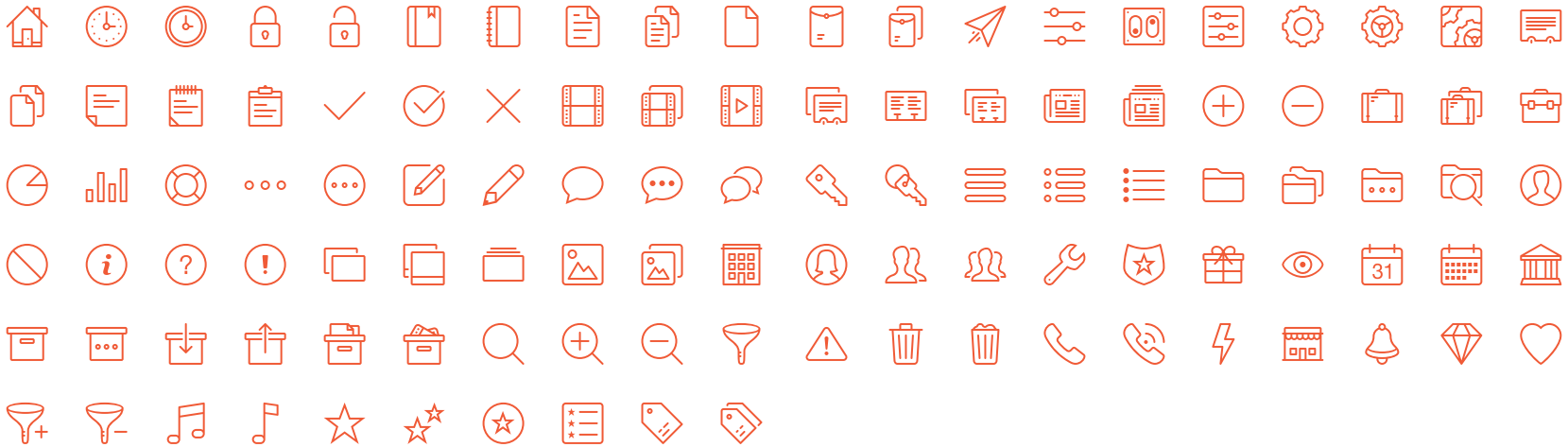

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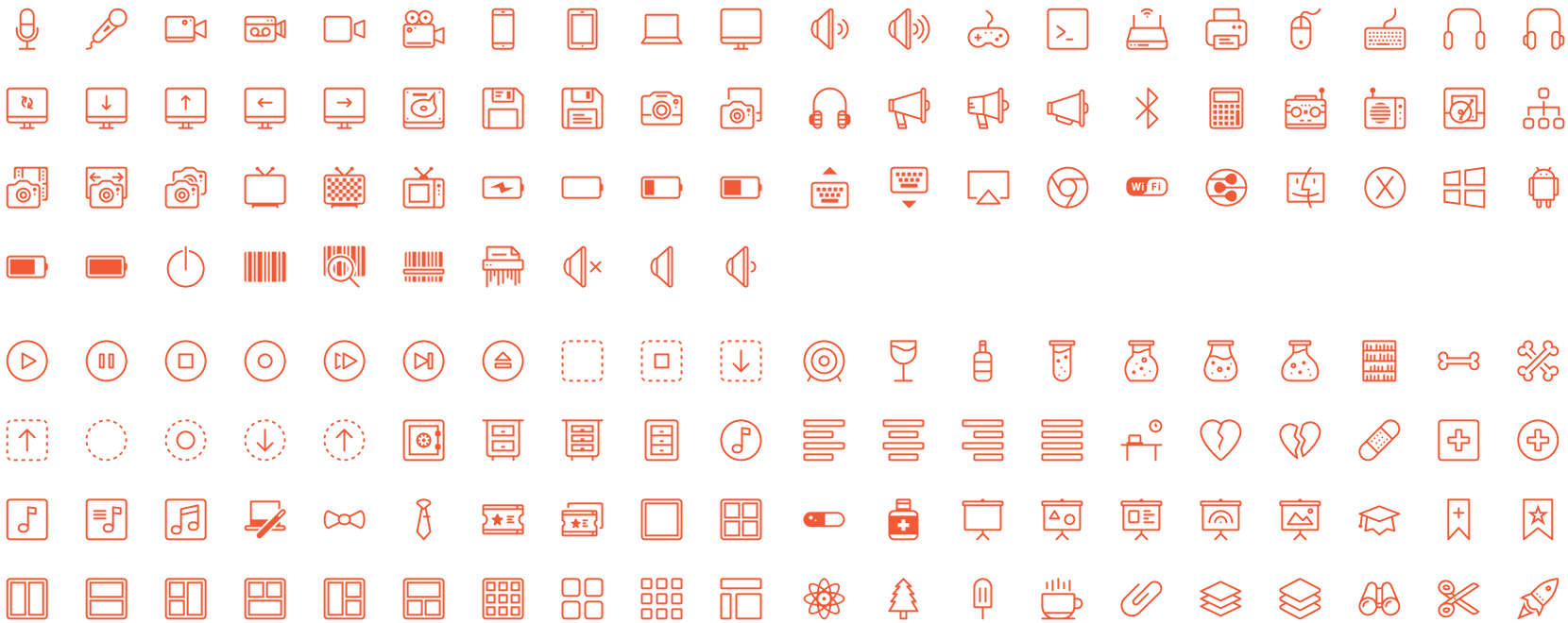

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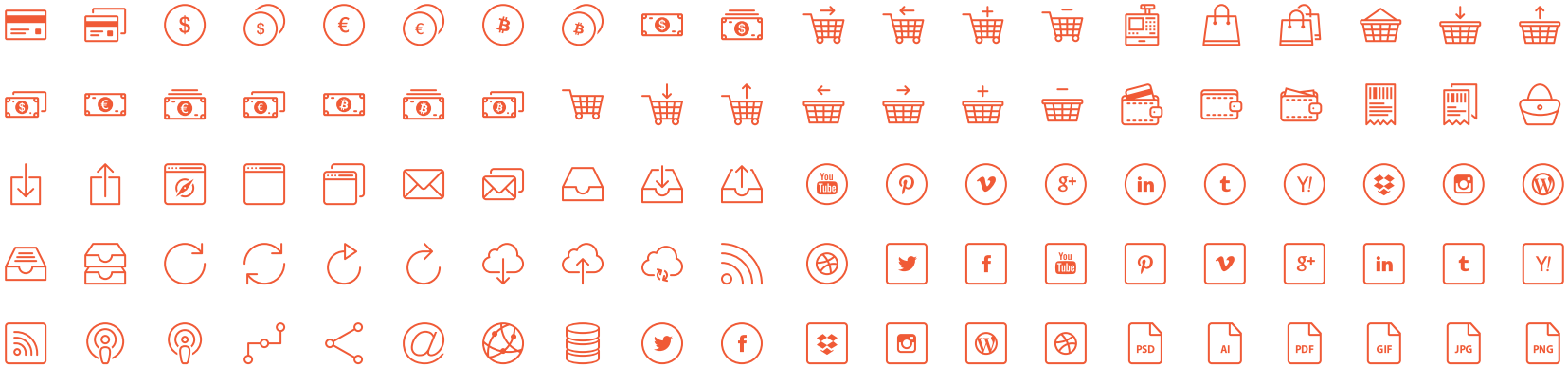

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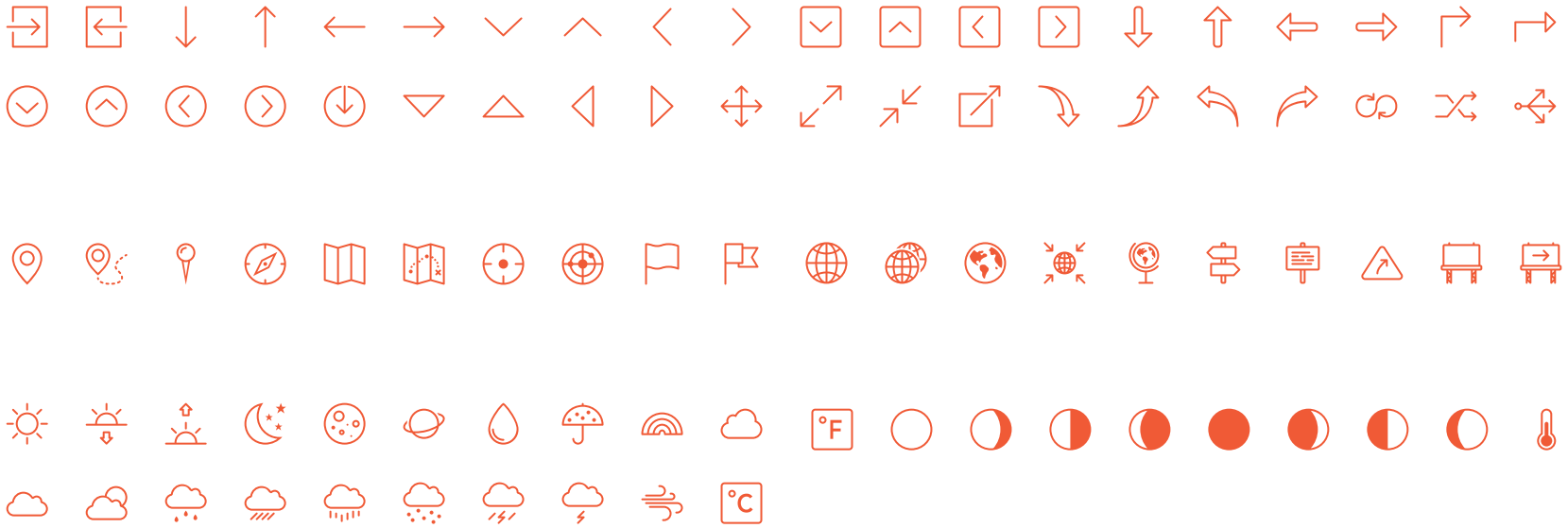

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