

CENTRL

Quick Start Guide

Managing the Vendor and Assessment Process

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4. Viewing Vendor Risk and Data

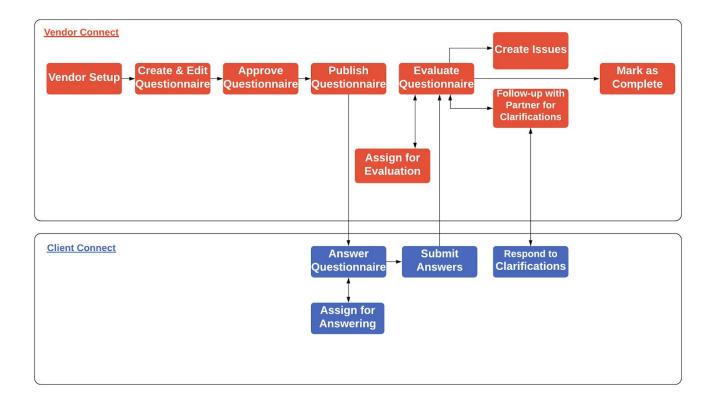
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CENTRL Platform

CENTRL is the only inter-company network that can be used by vendors and their clients to exchange, aggregate relevant data. We offer 2 modules:

- 1. **Vendor Connect**: Use this module to manage your vendor risk assessment processes. In Vendor Connect you create, manage and publish questionnaires; evaluate & score the vendor responses; and track remediation & issues. In Vendor Connect you have dashboards to stay on top of your assessments and issues activity, as well as reporting and analytics to analyze and aggregate your vendor risk information.
- 2. **Client Connect**: This module is used by your vendors to respond to your assessments and remediation issues you create



1.Vendor Setup

Vendors form the basis of CENTRL's external collaboration and Risk Management Platform. CENTRL's platform allows you to easily publish questionnaires to vendors, track the risk for vendors over time, and analyze the overall risk across all vendors for your organization. In CENTRL's platform, you can easily view and add Vendors if you have the appropriate permissions. Users with the *View Vendor Information* permission have the ability to see information about a vendor including Inherent and Residual Risk, Status, and more. The *Add/Edit Vendor Access* permission allows you to add vendors and edit a Vendor's information.

This section covers the following topics:

- <u>Adding a Vendor</u>
- <u>Managing Vendors</u>

Adding a Vendor

Navigating from Vendor Space

Users with appropriate permissions to *Add/Edit Vendor* in their user profile can add Vendors from the Vendor Space.



1. Navigate to the Vendor Space and click on the **Add Vendor** button on the top right as shown above.



Address	
Website	
Spend	
\$ 0.00	
Contract Start Date	
mm/dd/yyyy	~
Residual Risk	
Select	~
	Website Spend \$ 0.00 Contract Start Date mm/dd/yyyyy Residual Risk

2.Enter the Vendor details here. You have the option to set the Status, Criticality, Spend and Risk levels for the vendor. You can also assign an Internal Owner to the Vendor.

Adding an Internal Owner

New Vendor			Next: Add Conta
Risk			
Inherent Risk		Residual Risk	
Low	~	Low	~
nternal Owner			
Email Optional			
Email Optional jack@acme.com			
jack@acme.com			
jack@acme.com First Name			
jack@acme.com First Name Optional			

1.To add an Internal Owner, click on the **Email** field and select an existing user from the list.



You can also add a new user on-the-fly as an Internal Owner. Please note that the new Internal Owner should have the same email domain as yours. For example, if your domain name is @abc.com, then your Internal owner should also have a domain name ending with @abc.com.
 Enter a first name and last name as shown above. Once done, click on the Next: Add Contact button.

Adding a Primary Contact

New Vendor			Save Vendor Cancel
Primary Contact			
First Name	Last Name	Email	
Molly	Stevens	molly@dynamic.com	

1. Here you can enter information for your primary contact. When done, click on the **Save Vendor** button. Your Vendor details have been added.

Bulk-Importing Vendors

System Administrators have the option to bulk import Vendors from an Excel or CSV file that has the data in CENTRL-approved format. This enables users to easily create multiple Vendors at once.

Q			us		DISTRIBUTION ORGANIZATION ADVANCED CONFIG. and select Bulk Import Export Data Add Vendor
Vendor Name	Company Name 🗸	Criticality ~	Inherent Risk ~	Residual Risk v	Bulk Import
Accounts	accounts.com				3
Lendrite	Lendrite	Low	Severe	Medium	4
Manor Inc.	manor.com			Low	1
Mike	gamil.com				1
MyVendor1	myvendor1.com				1
New vendor	rocassociates.com				1
sampleUser	NYCB				1
ServPro	TBD	Low	Low	Medium	0

Exporting Vendor Details

System Administrators have the option to export the vendor details for reporting needs.

Vendor			U	SER ROLE VENDOR CONTACTS BUSINESS UNITS	DISTRIBUTION ORGANIZATION ADVANCED CONFIG.
Q				Click to ex	Download Detailed Report
Vendor Name 🔨	Company Name $$	Criticality \lor	Inherent Risk $ \smallsetminus $	Residual Risk $$	Contacts ~
Accounts	accounts.com				3
Lendrite	Lendrite	Low	Severe	Medium	4
Manor Inc.	manor.com			Low	1
Mike	gamil.com				1
MyVendor1	myvendor1.com				1
New vendor	rocassociates.com				1

1. Navigate to the *Vendor* screen from the *System Admin* module. Click on the *Export Data* button and select **Download Detailed Report** as shown above.

Attaching Files to a Vendor's Profile

You have the option to attach files and documentation related to a specific vendor.

	C Synamic Inc. Active	OVERVIEW	PROFILE	DOCUMENT REQUESTS	ASSESSMENTS	ISSUES
^ Em Em	Vendor Details Contacts Products Files	Comments			Click to	attach files
تًا ب	Q				1 Atta	ch Files
	File ~ Upload files	Attached On		Attached By ~		<u>+</u>

Navigate to the Vendor Profile screen and click on the Files link at the top as shown above.
 Click on the Attach Files link to upload files and save to your vendor's profile.

Dynamic Inc.	Active			OVERVIEW	PROFILE	DOCUMENT REQUESTS	ASSESSMENTS	ISSUES
Vendor Details	Contacts	Products	Files (1)	Comments				
Q							🛨 Atta	ch Files
Q File ~				Attached On ~		Attached By ~	1 Atta	ch Files
	ıort.xls			Attached On ~ lul 29, 2019		Attached By ~ jack Wu	1 Atta	ch Files

3. You have the option to download the attached files using the **Download/Download All** icon. You can also delete the files using the **Delete** icon.



Viewing Vendor Profile

Users who have permissions to *View Vendor Information* in their user profile can view the Vendor details in the Vendor Space. Vendor Information includes the general information of the vendor, the risk for a vendor, and additional custom attributes you can define.

訨	Vendors		VENDOR RISK	VENDOR DATA
^ ≣≣	Status (5) Clea	ır All		Add Vendor
Ś				
ম্র	GLOBEX	Dynamic Inc.		
	VIEW VENDOR SPACE	VIEW VENDOR SPACE		

1. Navigate to the Vendor Space and click on the Vendor name of your choosing.

Dynamic Inc.	ctive	OVERVIEW	PROFILE	DOCUMENT REQUESTS	ASSESSMENTS
Vendor Details Cor	ntacts Pro	oducts Files	Comments		Edit Details
Name			Address	5	
Dynamic Inc			N/A		
Status			Website	•	
Active			N/A		
Details					
Туре			Spend		
N/A			\$ N/A		
Criticality			Contrac	t Start Date	
N/A			N/A		
Contract Expiration E	ate				
N/A					
Risk					
Inherent Risk			Residua	l Risk	
N/A			N/A		

2. You can view the **Vendor Details** under the *Profile* tab as shown above.

3. You can view the *Contacts* and *Products* associated with the vendor by visiting the relevant tabs. **Note:** The *Profile* link will appear only if you have appropriate permissions to *View Vendor Information* in your user profile.



Editing Vendor Details

1. Navigate to the *Vendor Space* and click on the Vendor name of your choosing.

				L	-	1	Edit Detail
/endor Details	Contacts	Products	Files	Comme	nts		1
Name					Address		/
Dynamic Inc					N/A		
Status					Website		
Active					N/A		
Details							
Туре					Spend		
N/A					\$ N/A		
Criticality					Contract Sta	art Date	
N/A					N/A		

2. Navigate to the *Profile* screen and click on the Vendor Details tab.

3. Click on the **Edit Details** button to edit.

4. Once done, click on the **Save Changes** button to save the details.

Note: You can also add/edit the Contacts and Products information associated with the vendor by visiting the relevant tabs.

Updating Vendor Status

When a new vendor is added, the status will be set to *Active* by default. Users can update the vendor status to *Inactive* if they no longer wish to publish assessments to that vendor.

1. To update the status, navigate to the *Vendor profile* screen and click on the *Edit Details* button.



	- Decidente Elles Comme			Save Changes	Cance
endor Details Contact	s Products Files Comme	nts		1	
Name *		Address		Click to Save	
Dynamic Inc	Select Vendor status				
Status *		Website			
Select	~				
Active					
In Contract					
In Progress		Spend			
Inactive		\$ 0			
	P	Contract Start Date			
New Select		mm/dd/yyyy	~		

2. Select the status you wish to update to and click on the **Save Changes** button.

3. If you set the Vendor Status to *Inactive*, you will be asked for a confirmation as shown above. Click on **Save Changes** to proceed.

Save Changes		×
Changing the status of a Publish Questionnaires to	/endor to Inactive will result in users r that Vendor anymore.	not being able to
Save Changes	Cancel	

Note: Once you have set the vendor status to *Inactive*, you can no longer publish assessments to that vendor. In addition, marking a vendor as *Inactive* will cancel all upcoming assessments for that vendor and a confirmation message will appear.



Adding Vendor Products

	,	endor Details Contacts <u>Product</u> F	iles (1) Comments				Add Product
□ →		Product Name ~	Description ~	Status ~	Inherent Risk $ \sim $	Residual Risk 🗸	Attached File(s) ~
Ì		Lendrite Fiber	N/A	Pre-Contract Diligence	Severe	Low	0 File(s)
ይኔ		Lendrite Transactions	N/A	New	High	Low	1 File(s)
		Lendrite Wire Transfers	N/A	In Contract	High	Medium	0 File(s)

1. Navigate to the *Vendor Space* and click on the Vendor name you want to add Products for.

2. Click on the **Profile** link at the top. This will display the *Vendor Details*.

3. Within the Profile tab, click on the **Products** link. Here you can view the list of products associated with the selected vendor.

New Product	Save Produ
roduct Details Files	
Name *	Status *
Product1	New
Description	
Details	
Details Contract Start Date	Contract Expiration Date
	Contract Expiration Date mm/dd/yyyyy ~
Contract Start Date	
Contract Start Date mm/dd/yyyy	
Contract Start Date mm/dd/yyyy ~ Spend	
Contract Start Date mm/dd/yyyy ~ Spend \$ 0	
Contract Start Date mm/dd/yyyy ~ Spend \$ 0 Risk	mm/dd/yyyy
Contract Start Date mm/dd/yyyy ~ Spend \$ 0 Risk Criticality	mm/dd/yyyyy ~

4. Click on the **Add product** button to add a new product.

5. The *New Product* page will appear allowing you to enter product information such as Name, Description, and Status. You also have the option to capture additional information about the product such as the contract start and expiration dates, Spend and Risk Levels.



2. Managing Assessments

Creating a Questionnaire

Using CENTRL's Assessments module, you can create and publish questionnaires to your vendors. Your vendors will be able to answer the questionnaires on a secure platform with a full audit trail for both you and your vendor.

There are 5 ways to create a Questionnaire:

A.) **Using Industry Standard Templates:** You can create questionnaires using pre-digitized industry standard templates provided by CENTRL. For instance, CENTRL provides industry standard templates such as SIG, SIG Lite, VSAQ.

B.) **Create using an existing questionnaire:** You can create a new questionnaire by using one of the existing questionnaires your company has created as a starting point. You can then add, edit or delete questionnaire items to suit your needs.

C.) **Start new:** You can create a blank questionnaire using the template Start New Questionnaire from the list of templates. You can subsequently add questions, sections, and sub-sections manually from the Edit screen.

D.) **Import using the CENTRL Excel template**: You can also create a new questionnaire by importing an excel file using CENTRL's approved questionnaire template.

Note: The CENTRL's Excel template does not support the following during Import:

- Follow up Questions
- Table format Answer Type

Navigating to Manage Questionnaires

<u>ė</u>	Manage Questionnair	CCS DASHBOARD MY AS	SSIGNMENTS ACTIVE ASS	SESSMENTS UPCOMING A	SSESSMENTS MANAGE QUEST	TIONNAIRES REPOR
	Show : Active ~	Q 7				
]	Name ~	Description	Updated On 🔺	Status 🗸	Action	ſ
3	Web Application Security Questionnaire - 1.0 19 Questions	Google VSAQ - Web Application Security Questionnaire - 1.0	Jul 29, 2019	Published Total Send Count: 2	PUBLISH TO MORE 🗸]:

- 1. Navigate to the **Assessments** module from the left sidebar and click on the **Manage Questionnaires** screen as shown above.
- 2. Click on the **Create New** button to create a new questionnaire.

To learn more about this feature, click on this link: <u>Creating A Questionnaire</u>



Editing a Questionnaire

Once a questionnaire is created, you have the flexibility to customize your questionnaire to suit your needs. You can add or edit questions, sections, sub-sections, and follow up questions. You also have the ability to change the existing format and properties of your questionnaire.

Note: Questionnaires can be edited only if they are in *Draft* status and have not been Approved yet.

Please click on the links below to learn more on how you can edit the questionnaires.

- Adding a Section or Question
- <u>Moving a Section or Question</u>
- <u>Adding Reference Documents in Questionnaires</u>
- <u>Selecting Answer Types</u>
- Marking a Question as Mandatory
- Follow Up Questions
- <u>Request Documents</u>
- Add Tips to Answer
- Adding Instructions for Evaluator
- Modifying the Questionnaire Name, Version, and Description
- <u>Mapping Attributes</u>
- Modifying the Score Key and Grading Rubric

Approving a Questionnaire

In CENTRL's workflow, you can only publish questionnaires that have been approved. When a questionnaire is created, the questionnaire starts in a Draft status and eventually transitions to either an Approved or Published questionnaire.

Users who have the Approve permission enabled in their user profile or who are Questionnaire Admins can approve a questionnaire.

1.Navigate to the Manage Questionnaires screen and click on the Approve button. This will open the edit screen for the questionnaire.

lanage Questionnai	res DASHBOARD MY ASS	IGNMENTS ACTIVE ASS	ESSMENTS UPCOMING AS	SSESSMENTS MANAGE QUESTIONNAIRES REPOR
now : Active ~	Q 7			Create Ne
Name 🗸	Description	Updated On 🔺	Status 🗸	Action Click to Approve
Data Center Security Questionnaire - 1.0 10 Questions	Physical & Data Center Security Questionnaire- 2019	Jul 29, 2019	Draft	Approve
Web Application Security Questionnaire - 1.0 19 Questions	Google VSAQ - Web Application Security Questionnaire - 1.0	Jul 29, 2019	Published Total Send Count: 2	PUBLISH TO MORE V



2.You can review/edit the questionnaire. When ready to approve, click on the Approve button at the top.

Manage Questionnaires / Data Center Security Questionnaire / Edit Data Center Security Q Draft⊙	Approve
() EDIT QUESTIONS > (2) SCORE KEY	Click to Approve
Section View: All Questions: 10 Documents: 0	
QI. Questionnaire Instructions	Edit Instructions
+ A. Security at the Office [5 Questions]	1
+ B. Data Center Security [4 Questions]	1
+ C. Feedback [1 Questions]	:

3.A modal will appear which allows you to tag an internal user in your organization and add a comment. Click on the Approve link to confirm.

Publishing a Questionnaire

When you publish a questionnaire to your vendor, they will be able to respond to your questionnaire using CENTRL's secure online platform. CENTRL allows you to publish questionnaires that are approved or already published. Furthermore, you can publish a questionnaire only if you have the Publish permission enabled.

Publishing an Assessment from the Manage Questionnaires screen is only a 3-step process as opposed to the 4-step process from the Active Assessments because the questionnaire is already selected. **Steps for Publishing a Questionnaire**

Show : Active ~	Q 7			
Show.	X Y			
Name ~	Description	Updated On 🗸	Status 🗸	Action Click to Publish
Web Application Security Questionnaire - 1.0 19 Questions	Google VSAQ - Web Application Security Questionnaire - 1.0	Jul 29, 2019	Published Total Send Count: 2	PUBLISH TO MORE V
Data Center Security Questionnaire - 1.0 10 Questions	Physical & Data Center Security Questionnaire- 2019	Jul 29, 2019	Draft	Publish to Multiple

Navigate to the **Manage Questionnaires** screen and click on the **Publish** button as shown above. This will bring up the *Start & Publish Assessment* screen.

Note: Alternatively, you can also publish from the Edit screen if you want to review your questionnaire again and then publish to your vendor. When you are ready to publish, click on the **Publish** button on the top as shown above. This will bring up the *Start & Publish Assessment* screen. **Step 1: Select Vendor**



	\checkmark					
	Vendor	Contact	Review & Publish	n		
Who are you assessing?						
				Su	immary	
🖺 Globex 🗸	View All			伯	Globex	
				M	Loan Approval	
🕅 Loan Approval				٢	Initial Risk Assessm	
🖾 Loan Approval 🛛 👻				688 1	Web Application Secu	
				lo	Contact	
What is the purpose of the assessment?						
Initial Risk Assessment ×						
What Purpose should I choose? Show						
1						

The first step is to select a **Vendor** for whom the Assessment is being created. You can also optionally select the product. Click on the **Next** button to proceed.

Note: You also have the option to add a new Vendor and Product by typing in the name of the Vendor/Product. Also, you cannot publish to Vendors that are marked as Inactive.

Step 2: Select Contact

Vendor Contact Review & Publish	1
Who is going to answer this questionnaire?	Summary
External Vendor Contact	伯 Globex Edit
Send out the questionnaire to an external Vendor.	
2 rio@globex.com	Loan Approval Edit
	Pre-Contract Due-Dil Edit
🔘 Internal Business Unit Contact	🖺 Web Application Secu
Send out the questionnaire to an internal business unit contact. This can be done in order to assess an internal unit, a product (or config name, ex: site location) provided by the internal unit, or an external product used by the internal business unit.	rio@globex.com (Vendor Contact)
⊖ Me	
Assign the Questionnaire to yourself in order to start answering and evaluating. You can collaborate with internal users by assigning the whole questionnaire, sections or individual questions to them after Publishing.	
1	

Select a recipient and click on the **Next** button to proceed.

In this step, you can select who is going to answer this questionnaire.

The following options are available:

- **External Vendor Contact** You can select this option when you are publishing the questionnaire to your external vendor. You can then select an existing vendor contact or add a new vendor contact.
- Internal Business Unit Contact You can select this option when you are publishing the questionnaire to an internal business unit contact. This can be done to assess an internal unit, a product (or config name, ex: site location) provided by the internal unit, or an external product used by the internal business unit. You can then select or add the internal user.
 To learn more on Publishing to Internal Business Unit Contact, see following article: Publishing to Internal Business Unit Contact, see following article: Publishing to Internal Business Unit Contact
- **Me** You can select this option if you are answering the questionnaire on behalf of your Vendor. For example, when you are conducting *On-site Audits* or if you have the answers through other sources. To learn more on Self-publishing, see following article: <u>Self-publishing Questionnaires- Answer on Behalf of a Partner</u>

Step 3: Review and Publish

Start & Publish Assessment		с
	Vendor Contact Review & Publish	
Review		
Accounts Edit		
🖾 Risk Edit		
le Other Edit		
Web Application Security Questionnaire Test		
henry@accounts.com (Vendor Contact) Edit		
Publish On		
04/17/2020 (Today) ~		
Period		
Select Period 🗸		
Prepopulate Answers ③ Manage		
⊕Add Repeat ①		
Answering Due Date 🕕		
05/17/2020 ~		
Evaluation Due Date		
08/15/2020 ~		

The final step is to review the selected details, publish date, and due date for the Assessment. You can also add an optional Period for the Assessment and a message to send out to your Vendor. Click on the **Publish** button to publish your assessment to the intended recipient. Once the questionnaire is published, you can view the Assessment in the *Active Assessments* screen.

Note: An email notification will be sent to the recipient once the Assessment has been Published.

Publishing to Multiple Vendors

Using this feature, Questionnaires can be published to multiple vendors at a time to streamline publishing a questionnaire to various vendors.

To learn more about publishing to multiple vendors, see the following article: <u>Publishing to Multiple Partners</u>



Publishing Multiple Questionnaires

This feature allows users to publish multiple assessments at the same time to a single recipient without having to publish them one by one.

To learn more about publishing to Multiple Questionnaires, see the following article: <u>Publishing Multiple Questionnaires</u>

Publishing from Active Assessments

In addition to the above, an existing questionnaire Can also be published directly from the Active Assessments.

Active Assessments	S	DASH	BOARD MY ASSIGNMENTS	ACTIVE ASSESSMENTS	UPCOMING ASSESSMENTS	MANAGE QUESTIONNAIRES	S REPO
Show : Active ~	QY					Start New As	sessm
Name ~	Partner 🗸	Recipient ~	Published On 🗸	Due Date 🗸	Status 🗸		

Navigate to *Active Assessments* screen and click on the **Start New Assessment** Button as shown above. This will bring up the *Start & Publish Assessment* screen, the first step in a 4-step publishing process.

For more details on this alternative flow for publishing an assessment, please see this article: <u>Starting</u> <u>a new Active Assessment</u>.

Pre-populating Answers

Users can pre-populate an assessment with answers provided in previous assessments or mapped attribute values if any are available. This enables users to compare an answer with previous ones if anything has changed at the time of Evaluation.

Review ① Accounts can ⑤ Review Ø Other can Ø Other can	Vendor Contact Review & Publish	
Accounts (det Sek Edit		
III Risk Edit		
The Other For		
A		
Google VSAQ - Web Applicatio		
Anny@accounts.com (Vendor Contoct) Edit		
Publish On		
04/16/2020		
Period		
Select Period Toggle to enable pre-populate feature		
O Prepopulate Answers ⊙		
⊙Add Repeat ⊙		
Answering Due Date 💿		
05/16/2020		
Evaluation Due Date		
Message Optional		
Message Optional Message Optional With the Message fore		
05/16/2020 v		

To learn more about Pre-populate answer feature, see the following article: Pre-populating Answers

Managing the Pre population Setting

Start & Publish Assessment		C
	Partner Contact Review & Publish	
Review		
A Nestco Inc Edit		
Product Edit		
iii Risk Assessment		
Stu@nestco.com (Partner Contact Additional Recipients: Edit gabriel@nestco.com		
Publish On		
01/31/2020 (Today)	×	
Period		
Select Period	×	
Add Repeat Answering Due Date	e ← Click to Manage	
03/01/2020	×	

1. From the *Review and Publish* screen, click on the **Pre-populate Answers** toggle switch to enable pre-population and click on the **Manage** button.

A. Risk Assessment and Treatment				Prepopulate
B. Security Policy				Prepopulate
C. Organizational Security			0	Prepopulate
C.1 Is there a respondent information security function responsible for security initiatives? If yes, does it include:	No	No Files No Comment	8	Prepopulate
C.2 Do external parties have access to Scoped Systems and Data or processing facilities? If yes, Is:	No	No Files No Comment	0	Prepopulate
D. Asset Management				Prepopulate
E. Physical and Environmental Security				Prepopulate

2. Within the *Pre population Setting* screen, you can enable or disable the Prepopulate Answer setting for any question, follow-up question, or an entire section as per your requirement.

3. Once done, click on the **Save** button.



Pre-populating Evaluation Grades

Evaluation grades or scores will also be automatically pre-populated if the answer remains unchanged. This will reduce time in re-evaluating the response.

For example, using the pre-population feature, for a newly published assessment, if the answer remains the same i.e. "Yes", then the evaluation grade- "Good" will also be automatically carried over.

Change the Assessment Owner

Active Assessments		DASHBOARD	MY ASSIGNMENTS	ACTIVE ASSESSMENTS	UPCOMING ASSESSME	NTS MANAGE	QUESTIONNAIRES REPO
Show : Active ~	Q 7						Start New Assessme
Name ~	Vendor \sim	Service ~	Purpose 🗸	Published On 🗸	Due Date 🗸	Status ~	Click
Web Application Securit 19 Questions	Dynamic Inc.	Lending	Other	Jul 29, 2019	Sep 30, 2019	0% Published	19 Pending Q 0 In Review
Web Application Securit 19 Questions	GLOBEX	Loan Approval	Pre-Contract Due- Diligence	Jul 29, 2019	Sep 30, 2019	0% Published	0 Not Assigned
							Go To Overview View Report
							Download All File
							Extend Due Date
							Change Owner

- 1. Navigate to the **Active Assessments** screen from the Assessments module.
- 2. Click on the **3 dots** icon for the appropriate Assessment, and click **Change Owner**.
- 3. Select a new Owner from the dropdown list and click on the **Change** button.

Please note that the contact will receive an email notification when the Owner is changed.



Changing the Recipient for an Assessment

Show : Active	• ۹ ۷						Start New A	Assessme
Vendor ~	Service ~	Purpose 🗸	Published On 🗸	Answers Due ${\scriptstyle\lor}$	Evaluation Due ${\scriptstyle\lor}$	Click on the Status ~	3 dots and select Chang	e Recipier
Dayrep	Payments	Other	Dec 18, 2019	Jan 18, 2020	Apr 20, 2020	0% Published	0 Not Assigned	
. PIDE INC. Pide Inc.	Risk survey	Survey	Dec 18, 2019	Jan 17, 2020 Received: Dec 23, 2019	Apr 16, 2020	0% In Progress	Go To Overview View Report	: 💁
Dynamic Inc. Dynamic Inc	Lending	Initial Risk Assessment	Dec 9, 2019	Jan 8, 2020 Received: Dec 23, 2019	Apr 7, 2020	10% In Progress	Download All Files Edit Period Change Due Date(s)	
Dynamic Inc.	N/A	Initial Risk Assessment	Dec 9, 2019	Jan 8, 2020 Received: Dec 9, 2019	Apr 7, 2020	89% In Progress	Change Owner Change Recipient	•
- Dynamic Inc.	N/A	Initial Risk Assessment	Dec 9, 2019	Jan 8, 2020	Apr 7, 2020	Completed Dec 09, 2019	Assignment Properties Delete	•

1.Navigate to the **Active Assessments** screen from the Assessments module.

2.Click on the **3 dots** and select **Change Recipient** to select an alternate recipient.

3. Click on the **New Owner** and select a new recipient from the drop-down list.

You can also add a new recipient on-the-fly by entering their email address.

To learn more about Managing Assessment, click on the links below:

- Deleting An Assessment
- Deleting an Assessment
- <u>Archiving Assessments</u>
- Editing the Period for an Assessment
- <u>Changing the Due Date for an Assessment</u>
- <u>Assessment Overview Page</u>
- Previewing and Downloading an Assessment

Evaluating Answers

The Questionnaire Owner can begin the evaluation process once the answers from your vendor are received. You can either receive the answers individually or all at once, and you will receive an email notification in either case. The process of evaluating answers is the same for both cases. While evaluating a questionnaire, users have the following options:

- <u>Navigating to Assessment</u>
- <u>Using Filters</u>
- Evaluating Answers



- Evaluating Follow-up Questions
- <u>View Changed Answers and Compare Answers</u>
- <u>Grading an Answer</u>
- <u>Scoring an Answer</u>
- Evaluating an Assessment with Multiple Grading Scales
- <u>Reopening Questions</u>
- Question History in Evaluation
- <u>Revoking Questions</u>
- <u>Review an Assessment</u>
- <u>Changing Owners for a Published Assessment</u>
- <u>Responding to an Evaluation Assignment</u>
- <u>Submitting Individual Assignments</u>
- <u>Submitting Multiple Assignments</u>

Navigating to Assessment

From Email

Dynamic Inc.
Jack,
Molly Stevens from Dynamic Inc. has submitted back responses for: Web Application Security Questionnaire 1.0.
Submitting all answers!
View Assessment
If you have any questions, please visit http://supportcenter.oncentrl.com

When your vendor submits the answers for an Assessment, you will be notified via email with the Id and name of the question. You have the option to navigate to an individual question by clicking on the Id of the question. You can also navigate to the questionnaire by clicking on the *Review Questionnaire* button.

Using Filters

	Filters 1	V 🛛 🛛 Docume	nts (0) 👘 🕐 Pending (2) 👘	🔍 In Review (17) 👘 🎯 Evaluated (17) Satisfactory (2.33/5)	Review
	Section					
ections	Status	Pending	ication			
and the second second	i Assigned	In Review	isation Motods			
Questions	Answer	In Review - Not		Ita	· ·	
	Observed Answer	In Review - Not	In Review (E	valuated)	😫 🌍 🕀 Clarification	
Security	Evaluated	In Review - Eval	ua			
4000000	Evaluation Grade		What frameworks (if any)	does this application require?		
Feedbac	Clarification Click to	apply filters	✓ Answer Received Jun 22	, 2020 -10:00 AM		
Question	Last Updated By	Assigned	NIST			
	Apply Clear					

Filters on the top left provide the ability to filter by multiple dimensions such as the status of a question or whether or not a question has been evaluated.

To filter on your questionnaire, select the filtering criteria you desire and click on the **Apply** button.

Add Observed Answers

During an evaluation, you have the option to add observed answers to questions. Observed Answers are particularly useful when you have answers to questions that have been received outside of CENTRL. For example, you have conducted an onsite audit or you have asked a similar question in past assessments.

Click <u>here</u> to learn more about adding observed answers.

Assigning Questions or Section for Evaluation

During the process of Evaluating an Assessment, you assign a set of questions and/or sections to your colleagues. This feature allows you to easily and efficiently complete the evaluation process by assigning questions and sections to the appropriate subject matter expert.

When the *Assignees* have completed their assignments, they can submit the questions back to you to complete the evaluation process.

When you assign a question, the Assignees can view all their Assignments under the *My Assignments* tab. The Assignees are given the same options for evaluating a question as the Questionnaire Owner. When an assignee submits back an evaluated question, you will become the new assignee so you can review the question. Similarly, you can view all your assignments in the *My Assignments* tab.

Assigning an Individual Question

	ions Last Evaluated Jun 22nd 2020	Evaluate Overview
Filters 1 V Docum	nents (0) 🛛 🧑 Pending (2) 👘 Q. In Review (17) 👘 🤡 Evaluated (17) 👘 Satisfactory (2.33/5)	Review
Sections Bulk Assignments	1.1.Application Metadata Select assign question	
1. Application 15 Questions Not Assigned	1.1.3 In Review (Evaluated)	
2. Security Contacts 1 Question Not Assigned	What frameworks (if any Assign To: Select Assignee	
3. Feedback 1 Question Not Assigned	NIST Message:	
	Description Add Message Answer Grade: Answer Grade:	
	Good	
	1.2.Vulnerability Reporting and Management	
	Submit Clarifications (0) Complete Assessment	

1. Navigate to your question and click on the **Assign** icon as shown above.

2. Click on the **Select User** dropdown and select an existing user/assignee. You can enter an optional message for the new Assignee.

3. Once done, click on the **Assign** button.

Bulk-assigning Questions

The "Bulk Assignments" feature allows you to bulk-assign an entire section or sections, or individual questions, or assigning an entire assessment for evaluation.

Active Assessment Monsters Inc. Energy Due Diligence Questionnai ① 285 Question	15	Evaluate Overview
Filters 1 V Documents V Q In F	Review (285) 🛛 🥏 Evaluated (57)	Review
Sections Bulk Assignments	2. Asset safety and Custody	
1. Credentials 57 Questions Not Assigned	2.1.Regulations, laws and market practices	
2. Asset safety and Custody 59 Questions Not Assigned	2.1.1 In Review (Not Evaluated)	
3. Risk Mitigation 110 Questions Not Assigned	Observed Answer Legal Requirements	
4. Your Systems 23 Questions Not Assigned	Market Practices Attach File	
5. Core Services 36 Questions Not Assigned	Add Comment	
	© Evaluation Score:	
	Add Score of 20	



1. To bulk-assign questions, click on the **Bulk Assignments** link at the top left.

Active Australiant Montarts Inc. Integy Due Dilligence Questionnal 0 285 Questions	Evaluate Overview
Filters 1 V B Documents V Q In Review (285) Scaluated (57)	Review
1.2.3 Please state the full legal addresses of your Head Office and the locations and full legal addresses of any departments that outsourced suppliers.	Click on the checkboxes to
1.2.4 Please provide an overview of your expertise in the market and how you differentiate yourselves from your competitors.	assign multiple questions
 1.3. Your Regulatory Environment Go To Sub-Section 	Click to select an entire section
1.3.1 Where your Securities Services business (including custody, banking and securities services) is regulated and licenced by an or responsible and the frequency with which the approval or license is renewed. Please provide as an attachment a copy of the current ap	
1.3.2 Has your regulator(s) raised any material issues in respect of your Securities Services, Custody and Banking activities within the las	st 12 months? Not Assigned
1.3.3 If you are a branch of an entity incorporated in another country, please explain the division of regulatory responsibility between h	nost and home state regulators. Not Assigned
13.4. Diasea confirm that you commission local canditans consistentiate in colution to the acoustion of custods consister in your lusicelistic	ion Mot Arrianad 🗖
0 Question(s) Selected	Back Assign (0)

2. Select the questions you want to assign to your colleague using the checkboxes on the right.

3.Once done, click on the **Assign** button.

View Changed Answers and Compare Answers

When users who have enabled pre-population while publishing an assessment receive answers from their answering partners, they have the option to identify and view answers that have been changed using *Quick Filters*

Please note that this feature is only available to users in the scenarios mentioned below:

- 1. When users pre-populate an assessment with answers provided in previous Assessments.
- 2. When users pre-populate an assessment with mapped attribute values if any.

To learn more about Viewing Changed and Compare Answers, Click on the following article: <u>View</u> <u>Changed Answers and Compare Answers</u>

Creating Clarifications:

Clarifications allow you to ask for additional information from your vendor if their answer did not provide enough information. When you send a clarification to your vendor, they will have the ability to provide additional information and /or attach documents. All of the clarification questions, responses and comments are recorded at the question level for easy tracking.

Step 1: Creating a Clarification

Clarifications can only be created for questions in an *In-Review* status.

Active Assessment Marvel Modern Slavery Questionna ① 8 Question	ns	Evaluate	Review	Overview	:
Filters 1 V Documents (0) Ø P	rending (0) Q. In Review (8) Sevaluated (5) HIGH 0/60 Points (0%)				
Sections Bulk Assignments	C.1 In Review (Not Evaluated)				
A. Basic Information (Map) 5 Questions Not Assigned	What is the total yearly turn-over for the company?				
B. Basic Details 2 Questions Not Assigned	✓ Answer Received Sep 3, 2020-01:43 PM test answer				
C. Financial Details 1 Question Not Assigned	Clarification Not Submitted				
	BI STIN ↔ E E E E E C A				
	✓ X				
	1 Attach Files(0)				
	습 Evaluation				

1. Click on the "**In Review**" link and navigate to the question you want to create a clarification on.

- 2. Click on the **+Clarification** tab as shown above.
- 3. Enter your clarification question and click on the **checkmark** to save.

4. You have the option to attach files when requesting a clarification. Click on the **Attach Files** link and use the **Upload icon** (as shown above) to attach any documents. There is also a counter to show the number of files that have been added.

Control Active Assessment Marvel Modern Slavery Questionna O 8 Question	ins	Evaluate	Review	Overview
Filters 1 V Documents (0)	Pending (0) 👘 🔍 In Review (8) 👘 🧶 Evaluated (5) 👘 HIGH 0/60 Points (0%)			
Sections Bulk Assignments	what is the total yearly turn-over for the company?			
A. Basic Information (Map) 5 Questions Not Assigned	 ✓ Answer Received Sep 3, 2020-01:43 PM test answer 			
B. Basic Details 2 Questions Not Assigned	Clarification Not Submitted			
C. Financial Details 1 Question Not Assigned	B I S T T T C E E E E C C			
	↓ Attach Filest1) Upload Files(1) doc.pdf Score: Add Score of 20			

5. You can also remove a reference file using the *delete icon* next to the name of the file as shown above.

Note: You will need to submit your clarification(s) to your Partner company for them to see it.

Step 2: Submitting Clarifications

Only Questionnaire Owners and Questionnaire Admins can submit Clarifications. The **Submit Clarifications** button at the top shows the count of the clarifications that have been created and ready for submitting to your vendor.

	Laugh House Entertainment D 14 Questions All Changes S	aved	Eva	luate Overview
Filters 1	🔋 Documents (0) 👘 🧿 Pe	nding (0) Q. In Review (14) Satisfactory (2.67/5)		Revie
Sections	Bulk Assignments			
A. Basic Info		B.5 Clarification Requested + Clarification		
4 Questions	Not Assigned	Is there anything else you want us to know about the physical security at your office?		
B. Security at the Office		✓ Answer Received Sep 3, 2020 -09:17 AM		
5 Questions	Not Assigned	test		
C. Data Center Security 4 Questions	Not Assigned	✓ Clarification Not Submitted		
4 Questions	Not Assigned	test		
D. Feedback		▲ Attach Files(0)		
1 Question	Not Assigned			
		ඩ Evaluation		
		Answer Grade:		
		Select Grade Y		
		Evaluation Comment		
		Click to submit Clarifications		
		Previous Section Next Section		
		Submit Clarifications (2) Complete Assessment		
Active Assessment Pide	alor	-		
Web Application	n Security 🛈 👘 19 Ques	ions All Changes Saved	Eva	luate Overview
Filters 🚺	v 🕅 Docur	nents (0) 🛛 🧑 Pending (2) 📃 🔍 In Review (17) 📄 🤡 Evaluated (15) 🛛 Satisfactory (2.12/5)		Rev
 * 1. Application 	Go To Section			
 1.2. Vulnerability 	Reporting and Managemer	t Go To Sub-Section		
1.2.1 Because no	system is entirely free of se	curity issues, it's important to provide ways for external users to offer input and report vulnerabilities - Do yo	u have an easily discover	able way for 🛛 🗕
	hers to report security vulner		,	
				_
1.3. HTTPS and M	Aixed-Content Risks Go To	Sub-Section		
		e vulnerable to attacks if resources (often JavaScript, style sheets, or other active content) are included over pla		
		ugh plain HTTP will have access to the DOM of content protected by SSL. Make sure no resources are incluc irces from non-SSL sites are included, by displaying mixed content warnings To avoid these issues, do you ha		
			Click to submit	
2 Question	n(s) Selected	Can	cel Submit C	larification (2)
	(S) Selected		Submit C	anneation (2)

1. To submit the clarifications to your vendor, click on the **Submit Clarifications** button as shown above.

2. Here you can review the details for the clarification question you are submitting. You can also enter an optional message to send to your partner. Click on the **Submit** button to proceed.

Note: Your partner will be notified via email that you have sent clarification questions.



Creating Issues

CENTRL's Issues Management module allows you to create, publish, and track issues you find with your partners. For example, your partner may have sent an incorrect answer requiring further follow up. The appropriate action could be to create an issue noting the details and a recommendation for remediation of the issue.

You can then send it to your partner for them to review. Click <u>here</u> to learn more about creating an issue.

Scoring an Answer

Part of the evaluation process is assigning scores to answers your partner has sent back. When you evaluate an answer, you can assign a score based on the grading methodology associated with this questionnaire. Based on the grading rubric, each question will be assigned a score. An overall assessment score will be calculated once you have completed the evaluation.

Note: You can only add scores to answers that are *In Review*. Questions that are in *Pending* status cannot be evaluated.

Active Assessment Monsters Inc. Energy Web Application Security ① 19 Questions	-	Evaluate Overview
Filters 1 V Documents (0) Q I	n Review (19) 🛛 🧐 Evaluated (14)	Review
Sections Bulk Assignments		
1. Application 17 Questions Not Assigned	1.3.2 In Review (Not Evaluated) Applications served over SSL may still be vulnerable to attacks if resources (often JavaScript,	
2. Security Contacts 1 Question Not Assigned	style sheets, or other active content) are included over plain HTTP. This defeats the purpose of SSL, because the active content loaded through plain HTTP will have access to the DOM of Show More	
3. Feedback 1 Question Not Assigned	 Observed Answer Yes, we are very careful and have specific controls in place to prevent mixed-content issues. 	
	It wouldn't be too difficult for something to fall through the cracks and introduce mixed-content bugs	
	Attach File Atd Comment	
	Evaluation Click to add Score Score:	
	Add Score of 10 Evaluation Comment	

1. Navigate to the question to be evaluated and click on the **Add Score** box as shown above.

Web Application Security ① 19 Questions	All Changes Saved	Evaluate Overview
Filters 🚺 🛛 🖉 Documents (0) 🔍 In	Review (19) 🛛 📀 Evaluated (15)	Review
Sections Bulk Assignments		
1. Application 17 Questions Not Assigned	1.3.2 In Review (Evaluated) Applications served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL may still be vulnerable to attacks if resources (often JavaScript, served over SSL	
2. Security Contacts 1 Question Not Assigned	style sheets, or other active content) are included over plain HTTP. This defeats the purpose of SSL because the active content loaded through plain HTTP will have access to the DOM of Show More	
3. Feedback 1 Question Not Assigned	Vobserved Answer Yes, we are very careful and have specific controls in place to prevent mixed-content issues. It wouldn't be too difficult for something to fall through the cracks and introduce	
	mixed-content bugs t Attach File Add Comment	
	Devaluation score: 10 of 10 OF Evaluation Comment	

3. Add a score within the **Answer Score** box for the received response.

Note: The Answer score should be less than or equal to the *Of Score* mentioned outside the box. For example, the answer score has to be 1 of 1 or 0 of 1. It cannot be 2 of 1.

Grading an Answer

Part of the evaluation process is assigning formal grades to answers your partner has sent back. When you grade an answer, you can assign a grade based on the grading rubric associated with this questionnaire. Based on the grading rubric, each question will be assigned a numeric score. An overall assessment score will be calculated once you have completed the evaluation.

You can add grades to questionnaires with the Weights scale methodology set to them. Grading scales are set by the owner during the creation of the Questionnaire. Click <u>here</u> to learn more about grading scales.

Enable Auto-Evaluation for Questionnaire

Auto-Evaluation allows you to save time by automatically grading or scoring answers your partner has sent you. Auto-Evaluation is available for the following Answer Types: Y/N, Multiple Choice(Select One). These answer types are automatically evaluated by the System and the appropriate grade is marked.

Auto-Evaluation is not turned on by default, click <u>here</u> to learn how to set auto-evaluation for questions.

Evaluating Follow-up Questions

As part of the evaluation process, users can easily add grades or scores to follow up questions using the Qualitative and Max Score grading scale. **Note:** This feature is not available for the Weights Scale.

Note: You can only grade answers that are *In Review* status. Questions and follow up questions that are in *Pending* status cannot be evaluated.



To learn more about this feature, click on the following link <u>Evaluating Follow-up Questions</u>.

Mapping Answers during Evaluation

Web App 🛈 📔 25 0	Questions	Evaluate Overview Select the 3 dots
Documents (0)	⑦ Pending (0) △ Changed Answer (0/1) ♀ In Review (25) ◎ Evaluated (7) Unsatisfactory (0/5)	Map Answers
Bulk Assignments	B.B.1 In Review (Not Evaluated) Because no system is entirely free of security issues, it's important to provide ways for external users to offer input and report vulnerabilities - Do you have an easily discoverable way for external researchers to report security vulnerabilities in your systems?	Assessment Analysis Download all files Edit Period Change Due Date(s)
Not Assigned	 Answer Received Aug 26, 2020 -11:29 AM Yes, we have a published security email contact, or we provide another way for users to report security issues. Incoming reports are timely reviewed and triaged. 	Change Owner Change Recipient(s) Reopen Question(s)
Not Assigned	 No, we do not currently offer a way to report security vulnerabilities for priority handling 	
Not Assigned	🖻 Evaluation	

1. Open the relevant Assessment. Click on the 3 dots at the top right side of the page and click **Map Answers.**

2. Confirm the values that will be mapped and click **Map Answers**.

Reopening Questions

During the evaluation process, Questionnaire Owners and Admins can reopen one or more questions to allow respondents to update and resubmit answers back to the Questionnaire Owner.

To learn more about the Reopening questions feature, click on the following article: <u>Reopening</u> <u>Questions</u>.

Question History in Evaluation

The Question History in Evaluation allows users to review the history of all user activities associated with the selected question for tracking purposes

lters 1	v 🕖 Docume	nts 🗸 🛛 🧑 Pending (0) 🛛 🔍 In Review (5) 🛛 🤡 Evaluate	d (1) Unsatisfactory (0/5)	Revie
A Application Questions	k Assignments	A. Application A.A.Application Metadata	Click on 3 do select Questior	
		A.A.1 In Review (Not Evaluated) Provide the name of the application.	+₂ 🛃 ⊕ Clarification 👔	
		✓ Answer Updated Mar 26, 2020 - 04:50 PM Test	Create Issue Question History	
		✓ Previous Clarifications 1		
		Clarification asked on Apr 6 2020 - 12:38 PM		

- 1. Navigate to the *Assessments* module and click on the **Active Assessments** screen.
- 2. Click on any active/ ongoing **assessment** of your choice.

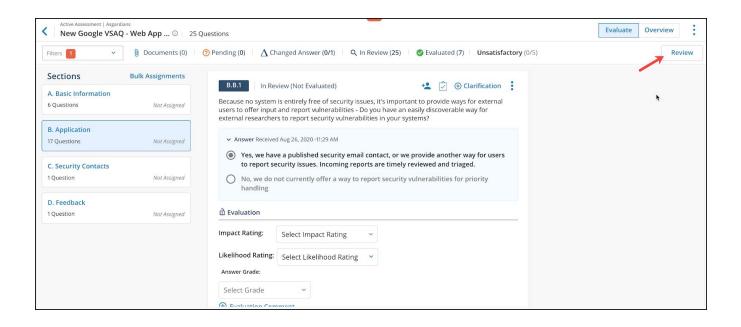
4. Click on the **3 dots** and select **Question History** as shown above. This provides a complete audit trail of user activities at a question-level as shown above.

Review Assessment

The "*Review* " functionality allows Evaluators to review a scrollable summary of all received responses at any time, or before marking the Assessment as "Complete".

The new Evaluation Review screen shows all questions with provided answers and evaluations in one scrollable view. Evaluators can click on the *Review* button to access the Review screen.





1. Click on the **Review** button as shown above. A preview will populate on the screen and the review button will change to close review.

Completing Evaluation

The final step in the Evaluation process is to Finalize a Risk Level based on the Overall Assessment Score. As you evaluate an Assessment, CENTRL automatically calculates an Assessment score based on the grading rubric associated with the questionnaire. The score for the questionnaire will be finalized when you complete an assessment.

If you are the Questionnaire Owner or the Questionnaire Admin, you have the ability to mark an assessment as complete. The *Mark as Complete* button will be at the top right of the screen, enabling you to complete the evaluation process for this Assessment.

Completing an Assessment

When you are finalizing your Assessment, CENTRL's system will present you a calculated score based on the answers your vendor has submitted and the grading rubric attached to this Assessment. Based on the Purpose you selected when you published the assessment, you will have the option to update either the Inherent or Residual Risk for the Vendor's product you are evaluating.



Active Assessment CDA Due Diligence Questionnai ① 13 Question:	Evaluate Overview
Filters 1 v Documents (0) 0 Pe	nding (0) Q in Review (13) Statusted (7) Unsatisfactory (1/5)
Sections Bulk Assignments	
A. Basic Information 3 Questions Not Assigned	B1 In Review (Evaluated) * © ③ Clarification If you have multiple offices with network-level access to systems or data containing confidential information, answer the following questions for the office with the fewest physical controls (the
B. Security at the Office 5 Questions Not Assigned	weakest link)- Are all facilities used exclusively by your company, or are some shared? Answer Received Sep 4, 2020-09:03 AM
C. Data Center Security 4 Questions Not Assigned	Yes, we are the only tenant of the facilities. No, some or all of the facilities are shared with other companies We don't have offices; everyone works from home.
D. Feedback 1 Question Not Assigned	D Evaluation
	Answer Grade: Good @ Auto Evaluated ()
	Evaluation Comment
	B2 In Review (Evaluated)
	Submit Clarifications (0) Complete Assessment

1. Click on the **Mark as Complete** button to finalize the evaluation process.

2. In the Mark Assessment as Complete modal, you can view the Calculated Score on the left and the corresponding metadata of the assessment on the right.

3. Below the Calculated Score, you have the option to update the Risk for the Product(s) you are evaluating.

Final Evaluation		×
Vendor: Product(s): Score:	CDA N/A Satisfactory (3.67/5)	
Product Risk:	 ○ Inherent ○ Residual ○ None Select Risk ✓ 	
Vendor Status:	Select Status 🗸	
	<u>Current Vendor Status</u> Active	
Comment:	Write your evaluation remark here	
	Remaining Text: 255	
Complete Cancel		



4. Click on the **Complete** button to mark the Assessment as Complete. The Assessment will be now moved to a *Completed* status. If selected, the Inherent and Residual Product(s) associated with this Assessment will also be updated.

Viewing a Completed Assessment

After an Assessment is marked as complete, you can view the Assessment in read-only mode.

Active Assessment len Vendor Due Dil				Evaluate Overview
Filters 1	∽ 🚺 Documents ∽ 🗏 🔍 In Re	view (11) 🕴 🥝 Evaluated (11) 🕴 Good (4.44/5)	\rightarrow	View Evaluation
Sections	Bulk Assignments	Α.		Re-open Assessment Assessment Analysis
A. null 2 Questions	Not Assigned	A.1		Download all files Archive
B. null 3 Questions	Not Assigned	Does a data center security policy exist?		
C. null 6 Questions	Not Assigned	 Observed Answer Yes No N/A 		

1. Click on the **3 dots** on the top right corner, then select **View Evaluation** to view the Evaluation summary for the Assessment.

2. You have the option to Re-open the Assessment if you want to re-evaluate it. Additionally, you can Archive an Assessment if you no longer want to see it in your *Active Assessments* page. Click on the **3 dots** next to *Overview* to access these additional options. To learn more on External Communication and Assessment Reminder, Click on following links:

- External Communication for Assessments
- Assessment Reminder and Past Due Notifications

Re-opening a Completed Assessment

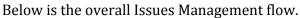
You have the option to reopen a *Completed Assessment*. This feature provides you with the flexibility to re-open your assessment if you wish to re-evaluate your assessment if required.

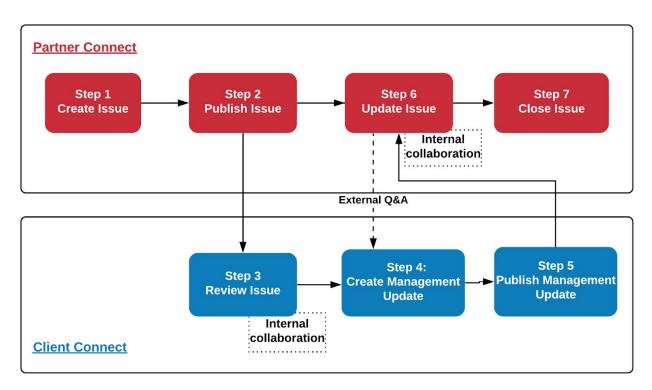
Note: Re-opening an assessment will remove its evaluation score and risk-level. The assessment will also be removed from several reports until the evaluation is finalized.

To learn more about Reopening a Completed Assessment, Click on the following article: <u>Re-opening a</u> <u>Completed Assessment</u>

3. Issues Management

CENTRL's Issue Management module allows you to create, publish, and track issues you find with your vendors. For example, your vendor may have sent an incorrect answer requiring further follow up. The appropriate action may be to create an issue and send it to your vendor for them to review. CENTRL's Issue Management module allows you to create, publish, and track issues you find with your business partners. For example, your vendor may have sent a response requiring further follow up or remediation. The appropriate action may be to create an issue and send it to your vendor for them to review.





To learn more about the Issue Management module, click on the link below:

• Issues Management Overview

Creating an Issue- From Assessment Module

Sections	Documents v 🛛 🕜 Pending (0) Bulk Assignments	Q In Review (107) Sevaluated (0) Unsatisfac	Click here
Sections	BUIK Assignments	A. Risk Assessment and Treatment	
BI. Business Information 18 Questions	Not Assigned	A.1 In Review (Not Evaluated)	Click here to creat
A. Risk Assessment and Treatm	ent	sdfdsh gfhdsg fhgds	Issues (0) () Issue
2 Questions	Not Assigned	✓ Answer	No issue has been created
		O Yes	NO ISSUE HAS DEEN CLEARED
B. Security Policy		°	
2 Questions	Not Assigned	() No	
C. Organizational Security		O N/A	
2 Questions	Not Assigned	D Evaluation	
D. Asset Management		Answer Grade: Select Grade ~	
2 Questions	Not Assigned	Evaluation Comment	
E. Human Resource Security			
9 Questions	Not Assigned		
F. Physical and Environmental S	Security	A.2 In Review (Not Evaluated)	+▲ 🗇 ↔ Clarification
2 Questions	Not Assigned		
		Are controls identified for each risk classified as: pre (technical or administrative controls)?	eventive, detective, corrective, predictive
G. Communications and Operat	tions Management		
19 Questions	Not Assigned	✓ Answer	
		O Yes	
H. Access Control		O Nº	
4 Questions	Not Assigned	U NO	

1. Navigate to the Questionnaire you are evaluating using the Assessments Module. You can create issues from the Questionnaire within the *Active Assessments* screen.

2. Navigate to the question you want to create an issue on. The Evaluation Pane will appear on the right side where you can Evaluate, Request Clarification, or Create Issue. Click on the **Create Issue** + under *Issues* tab as shown above.

Create Issue - Question BIS.	1.1	×
Name *	Risk assessment program	
Description:		
Recommendation:	BISCONT 99 ↔ EEE EE	
Reference Documents		
	rag and Drop or browse oad: 20 Files / Processing: 0 Files See supported files here	
Owner *	samantha@kredit99.com ~	
Vendor Contact	pujatest@lendrite99.com ~	
Severity *	Medium	- 1
Status *	Open ~	- 1
Due Date	mm/dd/yyyy	
Invalid and Closed	Select 🗸	
Create Create Ar	nd Publish Cancel	

3. The Create Issue Modal will appear allowing you to enter information regarding the Issue Name, Description, Recommendation, Severity, Status, and Due Date. You can also attach reference Documents your vendor can view if you choose to publish the issue to them.

Note: You can edit this information later. Scroll down to learn more about each field within the Create Issue Modal.

Creating an Issue- From Issues Module

lssues					DASHBC	ARD ISSUES	BY ASSESSMENT	REPORTS
Q 7						Clic	le here	Create Issue
ID v	Issue Name ${\scriptstyle \lor}$	Partner 🗸	Source ~	Severity ~	Due Date ~	Status ~	Progress ~	
13	Server issue	lendrite99.com David Smith	SigLite w/o Regulatory	Medium	N/A Published :Mar 02, 2018	Open	•	:
16		lendrite99.com David Smith	SigLite w/o Regulatory	Medium	N/A	Open	N/A	:
17		lendrite99.com David Smith	Partner Due diligence	Medium	N/A Published :Jan 19, 2018	Open	•	:
20		lendrite99.com	Due Diligence 2018	Medium	N/A	Potential	N/A	:
Total 17				Per Page 50 🗸				← 1 →

1. Navigate to the **Issues** screen from the *Issues* module.

2. Click on the **Create Issue** Icon on the top right corner as shown above.

Create Issue - Question A.1		×
Name *	Issue name ex:attachment issues	
Description	Purpose of creating this issue ex: attachments are required for newly created questions	
	Remaining Text: 168	
Recommendation	Recommendation of the issue	
	Remaining Text: 255	
Reference Documents		
± Dr	ag and Drop or browse	
Available Uplo	oad: 20 Files / Processing: 0 Files	
L	See supported files he	ere.
Owner	mia@abc.com ~	
Partner Contact	ps@eliesaab.com ~	
Severity	Medium	
Click here		

3. The *Create Issue* Modal will appear allowing you to enter information regarding the Issue Name, Description, Recommendation, Severity, Status, and Due Date. You can also attach reference Documents your vendor can view if you choose to publish the issue to them.

Note: You can edit this information later. Scroll down to learn more about each field within the Create Issue Modal. Please also note that the Issue Owner will receive an email notification on creation.

Publishing an Issue

When an issue is created, you have the option to publish it to your partner for review and further action. Only the Issues Owners and Issues Administrators have the ability to publish issues.

Note: The issue will not be visible to your Partner until it is published.

ssues			DASHBOARD	ISSUES BY ASSESS	MENT REPORTS
Q 7				Click to Publish Issue	Create Issu
16	Risk Log Issue	🛠 📳 Partner Due Diligence Issue 16: Risk Log Issue 🍵	[PUBLISH ISSUE	• • ×
50	Attachment Issu	Issue Information 🗸			VIEW SOURCE
22	Central Deposit	Owner: Greg Swanson Status: Potential 🧪	Contact: markdavis@lend Partner: lendrite99	rite99.com	
37	Code Test	Severity: Extreme Published On: N/A	Product(s): N/A Progress: N/A		
38	Internal Audit		Due Date: N/A Target Completion Date: N	Not Entered	
39	Compliance Repo	Issue Description \vee			
40	CRM Issue	Description: No description provided yet.			
41	Central Deposit	Recommendation: No recommendation provided yet.			
42	Use of operatio	External			
43	Central Deposit	Internal Collaboration		INTERNAL COL	LABORATORS 3

1. Navigate to the Issues module form the left sidebar and click on your created issue from the **Issue Details** screen.

2. Click on the **Publish Issue** button as shown above.



Publish Issue(s) Initial Risk Assessment - Manor Inc.		
Summary		
Source: Initial Risk Assessment		
Vendor: Manor Inc.		
Issue: Vendor Information for June 2019		
Publish To:		
s sam@manor.com 🖍		
Message:		
Hi Sam,		
Sending you this issue!		
	k	
Publish Cancel		

1. Within the confirmation modal, click on the **Publish** button to proceed.

Note: Please note that the contact will receive an email notification when you Publish the Issue.

Review Management Update

When you publish an issue to your Vendor, they can respond by sending Management Updates. You will receive an email notification when your vendor publishes a Management Update. Users can view the responses sent by their Vendors and download the attached documents.

>> Vendor Connect	Issues				DASHBOARD	ISSUES	BY ASSESSMENT	REPORTS
 止	۹ 🖓				/			Create Issue
	ID	Issue Name	Owner: James Sullivan Status Closed - Without Remediation 🖍	Contact: Boo Baby Vendor: Day Care by Boo				
	1	Test Issue 1	Severity: Medium Published On: Sep 2, 2020	Product(s): day care Progress:				
<u>8</u>	2	Test Issue 2		Due Date: N/A Target Completion Date: Not Entered				
	3	Test Issue 3	Issue Description ~				REFERENCE DOCU	MENTS 0
	4	Office Location	Description: No description provided yet.					
	5	Protection Issu	Recommendation: No recommendation provided yet. Resolution: They have fixed this issue					
			External O Internal History					
			Sep 02, 2020 04:28 PM PDT Published by: Boo Baby				ATTACHED DOCU	



In the Issue Details page, click on **Management Updates** to see the formal response and remediation plan by the Vendor.

Update Issue Status

ssues			DASHBOARE	ISSUES	BY ASSESSMENT	REP	ORTS
Q 7						Create	Issue
ID	Issue Name	K E Questionnaire 1 Issue 4: Office Location Issue				•	×
1	Test Issue 1	Issue Information 🗸			VIE	w sour	RCE
2	Test Issue 2	Owner: James Sullivan Status For Review Z Click to update Issue Status	Contact: Mike Wizowski Vendor: Mike's Laugh House				
3	Test Issue 3	Severity: Medium Published On: Sep 3, 2020	Product(s): Entertainment				
4	Office Location		Progress: ● Due Date: N/A Target Completion Date: Not Entered				
5	Protection Issu	Issue Description Description: What is your process for protecting data in a shared location? Recommendation: No recommendation provided yet. External O Internal O History	raget completion bate, for concrete		REFERENCE DOCUM	MENTS	0

1. Within the **Issue Details** screen, click on the pencil icon next to **Status**.

Update Issue Sta Initial Risk Assessment - 3	tus : Vendor Information for June 2019	×
Potential Open ✓ For Review Invalid		
Closed		
1		
Update Status Car	cel	

2.Update the **Status**. You can also optionally update the Sub Status and add a Resolution.

To learn more about managing issues, click on the links below:

- <u>Reviewing Management Updates</u>
- <u>Changing the Recipient of an Issue</u>
- <u>Closing an Issue</u>
- <u>Configuring Issue Management</u>
- <u>Issue Statuses</u>
- Internal Collaboration within an Issue
- <u>Viewing Issue History</u>

4. Viewing Vendor Risk and Data

Users now have a Risk Dashboard displaying the Severity, Inherent Risk, and Residual Risk across all their vendors.

Inherent Risk by Criticality: The Inherent Risk by Criticality heat map shows the number of Vendor Products of a specific Inherent Risk Level broken down by its Criticality Level. For example, a Product with higher Criticality and Higher Inherent Risk Level will be located on the darker red color towards the top-right area of the heatmap. In turn, a Product with lower Criticality and lower Inherent Risk Level would be located on the green bottom left area..

Residual Risk by Criticality: The Residual Risk by Criticality heat map shows the number of Vendors Products of a specific Residual Risk Level broken down its Criticality Level. For example, a Product with higher Criticality and higher Residual Risk Level will be of a darker red color and towards the top-right area of the heatmap, vs a Product with lower Criticality and lower Residual Risk Level.



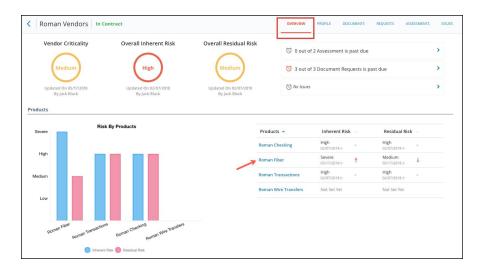
To learn more about this feature, click on the following links:

- Viewing your Vendors' Risk
- Viewing your Vendors' Data



Vendor Overview

The *Vendor Overview* screen gives a quick 360-degree view of the Vendor's overall risk. The *Vendor Overview screen* consists of two sections: the first section focuses on the overall vendor risk and data associated with the vendor and the second section focuses on the Inherent and Residual Risk for each of the Vendor's Products. To learn more, click here: <u>Vendor Overview</u>.



5. Dashboards and Reports

Vendor Dashboard

The Vendor Dashboard gives an overview of the Inherent Risk, Vendor Criticality, Residual Risk, Service types, Issue Severity as well as the Vendor information in tabular form. The Dashboard screen allows you to apply filters, drill down into granular data, export your widgets and more.

Navigating to the Vendor Dashboard

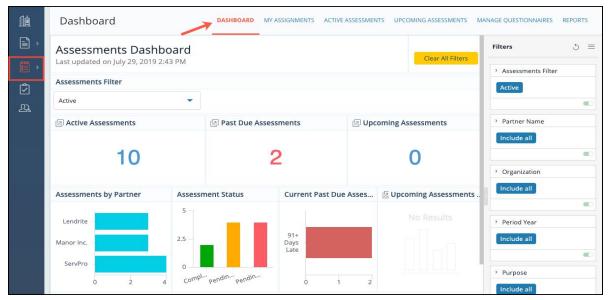
<u>l</u> i	Vendors			DA	SHBOARD VENDOR R	SK VENDOR DATA
■ > ■ >	🛗 🗄 Q 🏹 Status (5) Clear	All				Add Vendor
Ż	Vendor Name 🗸	Internal Owner 🖂	Documents 🖂	Requests 💛	Assessments 😪	Issues 🗸
ম্র	179.com	User One	51	14	259	134
	release.com	N/A	0	0	14	0
	Lending	N/A	79	0	4	0
	abc.com	N/A	0	0	3	0

Navigate to Vendor Space and click on the Dashboard screen as shown above.



Assessments Dashboard

Dashboard gives an overview of the Assessment statuses, Past-due Assessments and other relevant information for all the Assessments published by your company in the form of widgets. The Dashboard screen allows you to apply filters, drill down into granular data, export your widgets and more. **Note:** Only Questionnaire Administrators have access to the Assessments Dashboard.



1. Navigate to the Assessments module and click on the Dashboard link as shown above.

Assessment Reports

CENTRL's Assessments module allows users to generate various reports to view and analyze the evaluation scores across vendors or products, view the Assignment status or the questionnaires that are past due. If desired, you can also download these reports for further analysis.

Note: Only Questionnaire Administrators have access to the reporting functionality.

The Assessment Reports for vendor connect are categorized into Scoring, Assignments and Vendors. The following Reports are available:

Scoring

- <u>Scores by Questionnaires</u>
- <u>Scores by Section</u>

Assignments

<u>Assignment Status by User</u>

Vendors

• Past Due Questionnaires

	Reports DASHBOARD MY ASSIGNMENTS A	CTIVE ASSESSMENTS UPCOMING ASSESSMENTS MANAGE QUESTIONNAIRES REPORTS
	Scoring	Other
 . .	Scores by Questionnaires Show your scores and issues across Vendors for a selected questionnaire section.	Deleted Assessments Shows the Deleted Assessments
<u>\$</u>	Scores by Section Show your scores and issues across vendors for a selected questionnaire section.	
	Assignments	
	Assignment Status by User Analyze the status of assigned questions for a selected user.	
	Vendors	
	Past Due Questionnaires Shows vendors with open and past due questionnaires.	

To get started, navigate to the **Assessments** module and click on the **Reports** link at the top as shown above.

Scores by Questionnaire

The Scores by Questionnaire report gives a detailed view of the evaluations scores for all the questionnaires across vendors. You can view the evaluations scores at the questionnaire level as well



as at the section level. This report also allows you to filter by questionnaire, version and/or vendor drill down into granular data and also export the data.

🖌 Scores b	by Questionnaire swit	ch Report ~	MY ASSIGNMENTS	ACTIVE ASSESSMENTS U	PCOMING ASSESSMENT	S MANAGE QUESTION	INAIRES	REPORT
uestionnaires:	Due Diligence Questionnaire - 1. 0					₹ E	xport Data	~
Vendor 🗸	Product/Service 🗸	Internal Division 🗸	Eval. Date 🗸	Inherent Risk ~	Residual Risk v	Assessment Score	Assess Issues V	
B ServPr	Pdt1	Kredit	24 May 2019	Low	N/A	4.6/5	0 issue s	Previe Q
Total 1			Per Page 50	v			÷	1 →

Scores by Section

The Scores by Section report gives the scores and issues across vendors for a selected questionnaire section.

1. To view the report, navigate to the **Reports** screen and click on **Scores by Section** link.

Scores by Section Re ast updated on June 26, 2019 12						Clear All Filters	Filters 5
Questionnaire		Versio	on	V	endor		Assessment Name
All Questionnaires	-	1.0		+	dl Vendors	-	Include all
uestionnaire Information							• Version
Questionnaire Name	Versio	ו	Published	Average Evaluation <	Evaluation Grade Basis	Average Evaluation Score %	1.0
GDPR Data Protection Impact Assessment	1.0		2		0 5	1	Partner Name
Initial Risk Assessment	2019		1		0 5	1	
NIST Security Framework	1.0		3	0.1	6 5	3.1!	Include all
Due Diligence Questionnaire	1.0		2	2.2	9 5	45.7	
Web Application Security	1.0		2	2.3	8 5	47.5	Assessment Status
valuation Scores by Vendor			Evaluatio	on Scores			Include all

Assignment Status by User

The Assignment Status by User report gives an overview of all the assignments for a user. This report helps to analyze the status of assigned questions for a selected user.

1. To view the report, navigate to the **Reports** screen and click on **Assignment Status by User** link.



Reports / Assignment Status by User	by User Switch Repor	DASHBOARD MY ASSIGNMENTS AC	TIVE ASSESSMENTS UPCOMING ASSESSMENTS	MANAGE QUESTIONNAIRES REPORTS
Specify User Ron Swanson		Select User name		🛃 Export Data 🗸 🗸
Questionnaire 🗸	Due Date 🖂	Assigned (Open)	In Progress	Not Started 🗸
AP and GL Testing	25 May 2017	3	1	2
Google VSAQ - Physical & Data Center Security Questionnaire	30 Apr 2018	2	1	1
Total 2		Per Page 50 🗸		← 1 →

2. Select the User you wish to generate the report for, as shown above. The report shows the status of the assigned questions for the selected user.

3. To download the report, click on the **Export Data** link at the top right.

Past Due Questionnaires

The Past Due Questionnaires report gives an overview of the total number of questionnaires that are currently open and ones that are past due across all Vendors. You also have options to generate the report for a selected questionnaire.

1. To view the report, navigate to the **Reports** screen and click on **Past Due Questionnaires** link.

1 L	\Lambda Pas	t Due Questionnaires Switch R	DASHBOARD	MY ASSIGNMENTS ACTIVE A	SSESSMENTS UPCOMIN	G ASSESSMENTS	MANAGE QUESTIONNAIRES	REPORTS
))))		d on June 26, 2019 12:13 PM			c	lear All Filters	Filters Days Late Grouping	5 ≡
٢	Vendors		0 :	Past Due Assessments			Not Late N\A	
<u>8</u>	ServPro -			91+ Days Late			Partner Name Include all	
	0	2	4	0		6		
	Assessmen	ts						
	Vendor 个	Assessment Name	Days in Published Da	te ^ Assessment Status ^	Days in Due Date ${}^{\checkmark}$	Days Late ${}^{\checkmark}$		
	ServPro	GDPR Data Protection Impact Assessment	5/17/18	Pending Responses	6/1/18	423		
		NIST Security Framework	11/30/18	Pending Responses	12/31/18	210		

Issues Dashboard

The Issues Management Dashboard gives an overview of all the Issues by Status, Severity and Created or Published date in the form of widgets for your company. The Dashboard screen allows you to apply various filters, drill down into granular data, export your widgets and more.

1. Navigate to the **Issues** module and click on the **Dashboard** tab as shown above. This will bring up the *Issues Dashboard*.





Note: By default, you can see the Filters pane on the right side of the screen. You can click on the Expand icon to expand the Dashboard area as shown above.

Issues Reports

The Reporting functionality on the Issues Management module allows users to view and analyze issues created for your Vendors. If desired, you can also download these reports for further analysis. **Note:** Only Issue Administrators have access to the reporting functionality in the Issues Management module. The following Reports are available for Issues:

- Issues by Questionnaire: This report lists the number of issues for each assessment along with their status.
- Issues by Vendor: This report lists the number of issues for a specific vendor.

To get started, navigate to the Issues module and click on the Reports Tab on the top right.

>>> Vendor Connect	Reports		DASHBOARD	ISSUES	BY ASSESSMENT	REPORTS
	Assessments	Vendors				
値	Issues by Questionnaire	Display issues by Vendor				
· ·	Shows all the Issues for a selected questionnaire.	Display issues by Vendor				
) 						

Issues by Questionnaire Report

The *Issues by Questionnaire* Report gives an overview of the Issue severity, Issue status, and an Issue breakdown by assessment. You can apply various filters, drill down into granular data, export your widgets and more.



Issues by Last updated o			port		Clear All Fil	Filters	≡ C
Assessment						> All Assessm	ients
All Assessments		-				Include all	
Issue Severity			Issue S	tatus			
Medium 24	69%	Atreme High 7 Low 2	25 20 15 5 0 90 ¹⁰⁰	tial Open Issue For Review	Closed Invalid		
Assessment Name	Partner Name	Published	Due Date	Issue Name			

1. Click on the **Issues by Questionnaire** report from the Reports screen.

The Issues Report will be generated as shown above. This report allows you to filter by Assessment, drill down into granular data and export the data.

Issues by Vendor Report

The Issues by Vendor Report gives an overview of the Issue severity, Issue status, and Issue breakdown by vendors. You can apply various filters, drill down into granular data, export your widgets and more.

>> Vendor Connect	Reports	DASHBOARD	ISSUES	BY ASSESSMENT REPORTS
	Assessments Issues by Questionnaire Shows all the Issues for a selected questionnaire.	Vendors Display issues by Vendor Display issues by Vendor		

1. Navigate to the **Reports** screen and select the report option *Issues by Vendor*.



Issues by Vendor Repor Last updated on July 31, 2019 7:56 AM		Clear All Filter:
Vendor	Assessment	> Partner Name
All Partners	All Assessments	Include all
Issue Severity	Issue Status	Assessment Name
69% Extreme	25 20 20 15 7 10 2 2 2 2 2 2 2 20 20 20 20 20 20	Include all

The Issues Report will be generated as shown above. This report allows you to filter by Vendors and/or Assessment, drill down into granular data and export the data.

Interacting with CENTRL's Dashboard and Reports

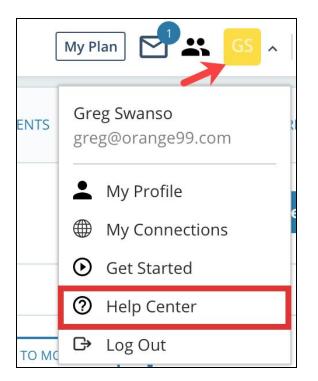
Each Dashboard gives an overview of the relevant information pertaining to the module you are viewing. Within each dashboard, you can interact with the data, filter by different dimensions, and export as needed.

Click <u>here</u> to learn more about interacting with the dashboards.

Support

To learn more about the different features offered within the platform or to submit a support request, please navigate to the CENTRL Support Center page by following the steps below:

• Click on your initials on the top right and select *Support*.



• You'll be directed to the CENTRL Support Center page. The support center provides access to articles on the full breadth of the system and allows you to submit a support request by clicking on **Submit a request** on the top-right.

CENTRL Support Cen	CENTRL Support Center Submit a Suppo			
Q Have a question? Ask or enter	a search term here.			
Getting Started	System Admin	General	Most Helpful Login and Password Reset Reset your login password. Answering a Questionnaire Answer a Questionnaire Sent by your Partner.	
Assess360		~	Assigning Questions and Sections Assign questions and sections to your colleagues.	
Vendor360	Responding to an Answering Assignment Respond to an assignment sent by your colleague.			

• Fill in all the required information on this page and click on **Submit**.

Workaround Available?	
workaround Available?	
Is there are workaround for the issue. Please add any relevant details or explanation.	
Steps to Reproduce*	
Please provide specific steps for the issue to occur or to reproduce. Please attached and reference to	creenshot if
applicable.	oreenanot ii
Existing Case Number (if applicable)	
Attachments	
Add file or drop files here	
1	
Submit	
Submit	

• To chat with one of our support representatives from within the platform during normal business hours, click on **Support Chat** at bottom-left.

	Advanced Configuration	USER	ROLE	VENDORS	CONTACTS	DISTRIBUTION	ORGANIZATION	ADVANCED CONFIG.
^	Platform							
ڑی بھ	Vendor Configure fields for your Vendors to help better categor reports and Vendor grouping.	ize them	ı for					
Support Chat	Services Configure fields for Vendor Services. Configure Services Con							
Last Login: 07/31/2019 08:00	 Platform Settings Configure system fields and columns in My Assignment: 	s, Active						

Follow our Release Notes

As we are constantly working to improve your CENTRL experience, you can stay updated with our upcoming new features and improvements by following our Release Notes page in our CENTRL Help Center. To do so, navigate to our Release Notes page by clicking <u>here</u> and click on the "Follow" button

as shown in the screenshot below. By doing so, you will automatically be notified of our future releases. Please feel free to forward this to other team members in your organization.



Link to follow our Release Notes page: <u>Release Notes</u>

Document Version

Last edited	Author	Version
09/04/2020	Various	V5
04/20/2020	Various	V4
07/31/2019	Various	V3
04/02/2019	Various	V2