



## GRC Connect Knowledge Base



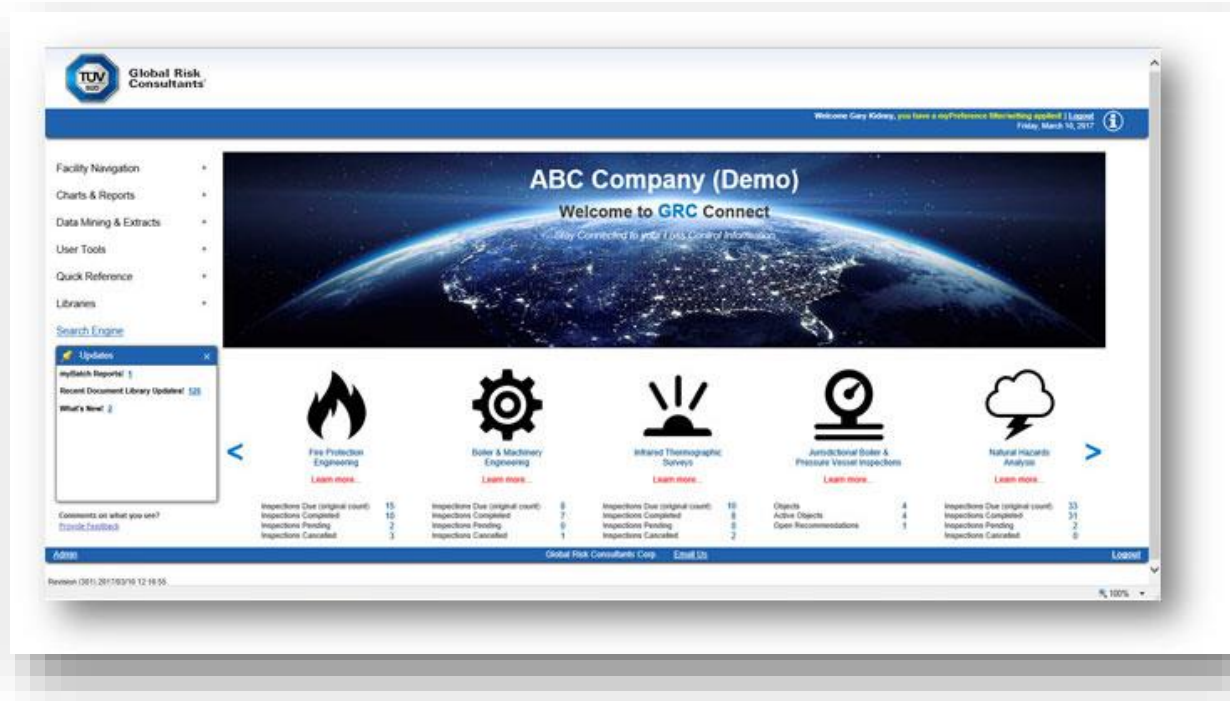
Please select a help topic:

- Introduction
- Accessing GRC Connect
- Main Menu - Left-Side Flyout Navigation Menus
- Facility Navigation
- Charts & Reports
- Data Mining & Extracts
- User Tools
- Quick Reference
  - Auto-Rec Response Summary
  - Program Status Summary
  - Client Information (optional)
- Libraries
  - Recent Document Library Updates!
  - Document Library
  - Favorites Library
  - What's New!
- Search Engine
- Updates Menu
- Provide Feedback
- Services Carousel
  - Services Icons
  - Learn more...
  - Inspection Statistics
- Facility Level – Scheduling & Values
- Facility Level – Facility Rating
- Facility Level – Recommendations
- Facility Level – Menu Selector
- Facility Level – Change Service
- Program Level – Charts & Reports
- Program Level – Data Mining & Extracts
- Program Level – myBatch Reports!
- Program Level – Quick Reference
- Grid Features

# GRC Connect Knowledge Base

## Introduction

GRC Connect client database system is a full-featured, easy-to-use, information system that can be accessed from any internet connection. It provides access to engineering documents, data extracts and various summary and detailed charts and reports for each of the Services provided to your Company.



## Accessing GRC Connect

From your internet web browser, go to the GRC web site, <http://www.globalriskconsultants.com>. Enter your email address and password. Click **Authenticate** to verify your database access. Note: If you have forgotten your password, please click on **Forgot/Reset Password**. That will send the user an email to complete the process of resetting of their password.

**Single Login Process** - Eliminates the two-part Client and User login process by having the user's unique email address used as their User ID.



**Account Access** – provides access to all locations and data.

**Division/Custom Access** – provides only the information within a Division/Custom designation.

**Document Library Access** – provides limited visibility, functionality and access to the Document Library to access all engineering reports and diagrams, as available.

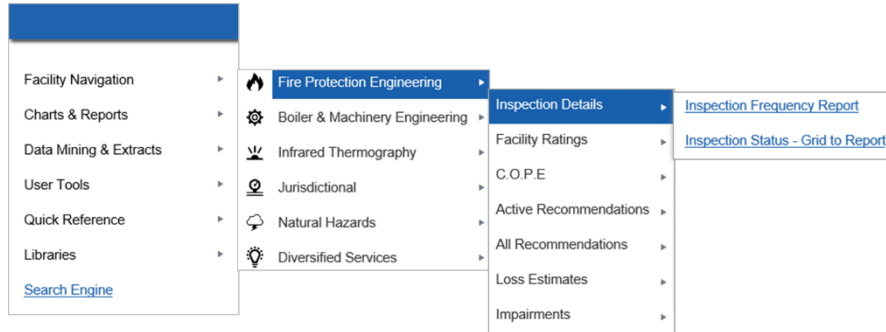
**Facility Manager Access** – provides limited visibility, functionality and only access to a single location.



## Main Menu - Left-Side Flyout Navigation Menus

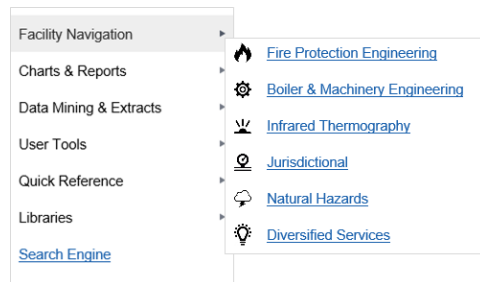
The flyout menu technology allows the user to preview all navigation with one click. All areas of GRC Connect can be accessed from this one menu for all Facility-level Site Navigation, Program-level Charts & Report or to all Data Mining & Extracts.

The flyouts allow you to review each category without having to navigate away from the Main Menu.



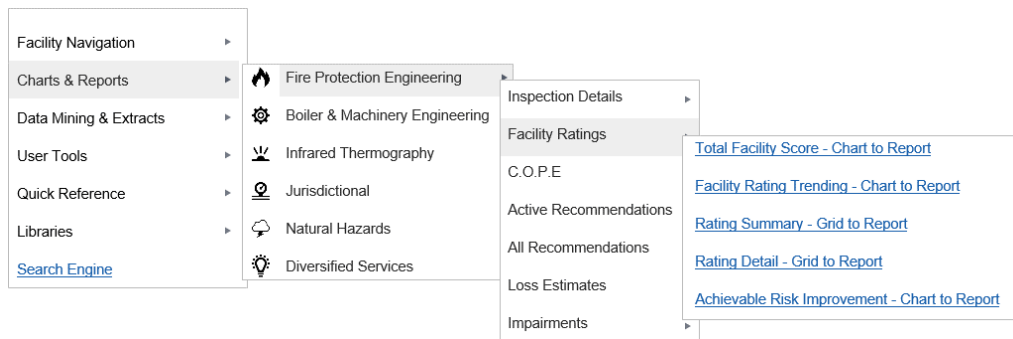
## Facility Navigation

The **Facility Navigation** allows user to drill down to a specific location by Service, providing location-level detailed information for Scheduling & Property Values, linked Engineering Reports, Facility Rating (current and historical), Recommendations (all or only active), Charts & Reports and Data Extracts.



## Charts & Reports

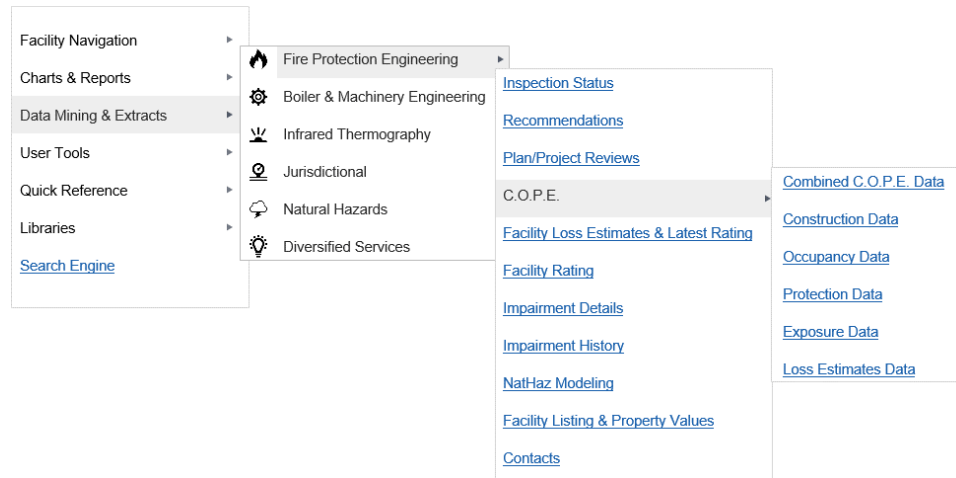
The Charts & Reports menu selection provides user access to all output reports offered by individual Service provided, then categorized by the details of the data that is collected within that Service.





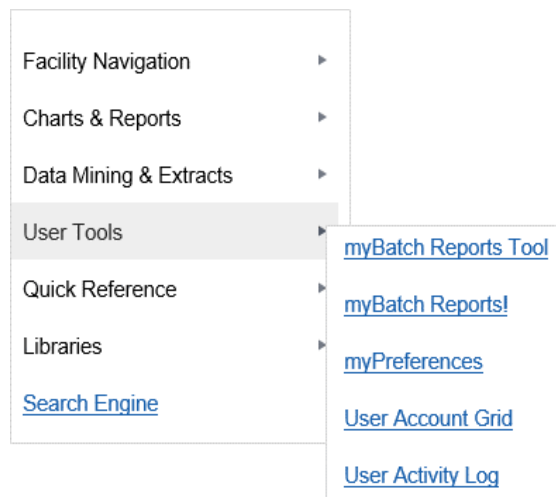
## Data Mining & Extracts

The Data Mining & Extracts menu selection provides user access to all data offered by individual Service provided, then categorized in accordance with what is collected within that Service.



## User Tools

There are three main areas of navigation within **User Tools**:



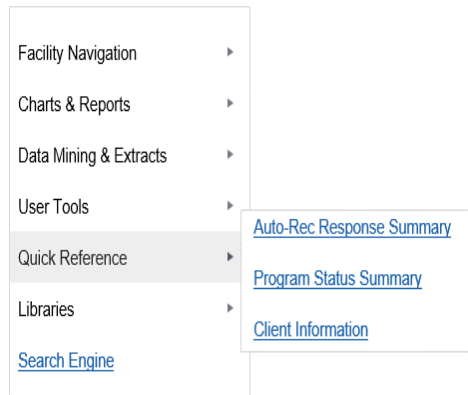
**myBatch Reports Tool** – This tool allows the user to select multiple reports to be packaged into one Adobe .pdf file. Once the report is compiled, the user will receive an email confirmation in addition to the report being available under the myBatch Reports area of the Updates notification popup menu.

**myPreferences** – This feature allows users to create their own custom filter or set their settings (units/currency). Once a custom filter/setting is applied, the entire database will reflect those applied settings, including all charts, reports and data extracts.

**User Account Grid & Log** – This tool allows the GRC Main Contact to review and edit user records. This is restricted to risk management users with Account-level access.

**User Activity Log** - This tool allows same Account-level user ability to review the activity of their user records.

## Quick Reference

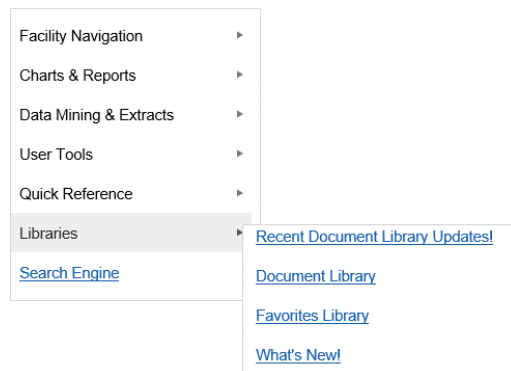


The **Auto-Rec Response Summary** provides a summarized accounting of all response activity for each Service, including the number of requests for responses that were sent, responses completed, in progress and overdue.

The **Program Status Summary** is an interactive dashboard with drill-down capability, located under the Quick Reference section on the main menu. This new web tool and output report provide summarized statistical totals condensed to one scrollable web page, producing a one-page output report.

**Client Information** serves as a filing cabinet to store additional client-specific files you may want to share with your users. These files are uploaded and maintained by our assigned GRC Account Coordinator.

## Libraries



The **Recent Document Library Updates!** includes all engineering reports and/or diagrams added since your last login. This was designed to provide easy access and notification of recent activity of completed inspection reports. Simply click on the link and the report/diagram will appear. From there you can print or save the file to your local computer.

**Note:** After you close the grid, the records will no longer appear until there is additional activity. Remember all Documents are still available under the Document Library for future reference.

The **Document Library** features an online filing system containing links to all current and historical engineering reports and/or diagrams. Simply click on the link and the report/diagram will appear. Once the file opens, you can print or save the file to your local drive.

The **Favorites Library** section contains all Favorites that the user has created. It identifies the Practice and Type of Grid the Favorite was created from. From this menu you can Recall, Rename or Delete any Favorite. You can extract the list for review as well. If you click Recall you will go to the Favorite Grid selected. (See Creating Favorites for more details on creating Favorites)

The **What's New!** library will include documentation on the latest enhancements to GRC Connect. In the top right corner, you can use the What's New topic drop-down menu selector to review current and previous enhancements.



## Search Engine

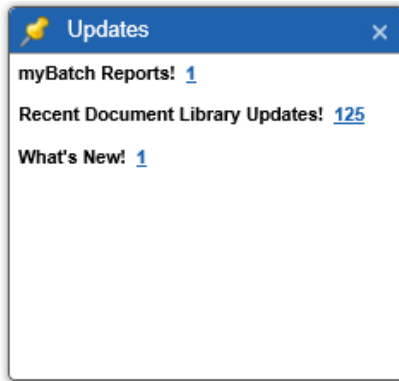
- Facility Navigation ▶
- Charts & Reports ▶
- Data Mining & Extracts ▶
- User Tools ▶
- Quick Reference ▶
- Libraries ▶
- [Search Engine](#)

The Search Engine feature is available for **Risk Manager** and **Document Library** level users. From the **Main Menu**, you will see the new **Search Engine** feature. This feature allows you to search through any of the content contained within any engineering and/or plan review Adobe .pdf document linked to your database.

Simply click the **Search Engine** in the side menu, enter your keyword(s) and hit the **Submit** button. All files containing your keyword(s) will appear in the results section, categorized by the individual GRC Services for easier focus in locating a desired file.

Note: For multi-word searches, add quotations around your keywords, i.e., "Loss Control".

## Updates Menu



The Updates menu will identify any of the myBatch Reports, recently uploaded engineering reports or diagrams or when an enhancement to the application has been implemented since your last login.

Simply click on the numeric value which will navigate you to the application area. Once you have reviewed all of the updates, the Update menu will close. You can also click the "X" to close the form at any time.

## Provide Feedback

Accessible from most pages on the bottom left corner, the **Provide Feedback** popup provides the user an easy way to submit comments or suggestions to the Development Team or to report any issues you may be experiencing.

Provide Feedback

Gary Kidney, your feedback is very important to us. The comments you provide will help us improve our level of quality, service and help shape the overall features and functionality of the GRC Connect system.

Enter Comments Here

SubmitCancel

## Services Carousel

There are three areas of navigation contained in the Services carousel:

Fire Protection Engineering <a href="#">Learn more...</a>	Boiler & Machinery Engineering <a href="#">Learn more...</a>	Infrared Thermographic Surveys <a href="#">Learn more...</a>	Jurisdictional Boiler & Pressure Vessel Inspections <a href="#">Learn more...</a>	Natural Hazards Analysis <a href="#">Learn more...</a>	Diversified Services <a href="#">Learn more...</a>
Inspections Due (original count) 16 Inspections Completed 10 Inspections Pending 2 Inspections Cancelled 4	Inspections Due (original count) 8 Inspections Completed 7 Inspections Pending 0 Inspections Cancelled 1	Inspections Due (original count) 10 Inspections Completed 8 Inspections Pending 0 Inspections Cancelled 2	Objects 4 Active Objects 4 Open Recommendations 1	Inspections Due (original count) 33 Inspections Completed 31 Inspections Pending 2 Inspections Cancelled 0	Inspections Due (original count) 11 Inspections Completed 2 Inspections Pending 9 Inspections Cancelled 0

**Services Icons** – Clicking directly on the icon will take you to the Facility Listing grid for drilling down to a particular facility.

**Learn more...** provides a more detailed explanation for each of the Service GRC provides. These pages open an Adobe .pdf file which can be printed or saved to the user's computer.

**Interactive Statistics** - provides a quick summary of each active inspection program and is also interactive with drill-down capability by simply clicking on any of the numeric values, taking the user to the Inspection Status grid, filtered on that selection.

## Facility Level – Scheduling & Values

The **Scheduling & Values** page provides a snapshot view of the inspection status, links to current and previous engineering report and diagram in addition to the breakdown of Property Values.

You can use the arrows to navigate from one facility to the next or use the **Find** function.

Scheduling & Values

Facility Ratings

Recommendations

GRC Loc. No. 1001.0002 Client Loc. No. ABC0002 Latitude 44.2977 Longitude -78.3273

Address 489 Park Street North, Bldg 5 Division Name Division C

City Peterborough State Country Canada Postal Facility Name Facility 2

Location 2 of 13 Find Custom Access Demo

Document Links	Scheduling	Location Values
Date of Current ER 21-Feb-17	Inspection Type Regular Inspection	Effective Date 18-Nov-14 Currency Code USD
Date Mailed to Client 01-Mar-17	Frequency 1 per Yr	
Link to Current ER <a href="#">Click Here</a>	Next Insp. Year 2016	(In Millions)
Link to Latest UR or LE	Inspection Target 01-Jun-16	Building 0.000 Gross Profit 0.000
Link to Latest Diagram <a href="#">Click Here</a>	Status Completed	Equipment 0.000 Wage / EE 0.000
Date of Previous ER 09-Mar-16	Date Cancelled	Inventory 0.000 Misc. 0.000
Link to Previous ER <a href="#">Click Here</a>	Date Completed 20-Jun-16	Raw Stock 5.000 Other 0.000
	Date Mailed 30-Jun-16	Builder's Risk 0.000 BI Total 0.000
	Engineer Barasch, Dan	Misc. 0.000 Local TIV 0.000
	Record 1 of 2	PD Totals 0.000 US TIV 0.000

Scheduling Comments:

new comment





## Facility Level – Facility Rating

The **Facility Ratings** page provides the details of each current rating. Using the arrows on the right side under the Inspection Date, provides ability to view any historical ratings for same location.

Scheduling & Values		Facility Ratings		Recommendations				
GRC Loc. No.	1001.0002	Client Loc. No.	ABC0002	Latitude	44.2977	Longitude	-78.3273	
Address				489 Park Street North, Bldg 5		Division Name		Division C
City		Peterborough	State		Country	Canada	Postal	
Location		2 of 13		Find		Facility Name		Facility 2
Custom Access		Demo						
Passive Score:		Flood	Earthquake	Windstorm	Constr.	Occup.	Other Exposure	Inspection Date
Weight	5 %	5 %	5 %	10 %	20 %	5 %		26-Jul-11
Rating	2	1	3	4	9	5		1 of 2
Description	Within 100 year Flood	FM Zone 50 or Zone	3 Sec. Gust > 120 mph	Plank on timber	Low hazard with un	Moderate Exposure		Total Passive Score
								28
Active Score:		Protection	Human Element	Nat'l Hazard Protection	Bus. Cont. Planning			
Weight	20 %	20 %	5 %	5 %	Total Active Score			
Rating	5	7	3	1	26			
Description	Protection substandard in more	Good - Meets or nearly meets	Protection severely deficient and	No useful plan in place	Total Active Score with Recs Completed			
					34			
Rating with All Recs Completed	9	4	5	10				
Description	Protection meets standards in	Fair-Poor - Substandard in more	Protection substandard in one	Business Continuity Plan appro				
APL (PD + BI)		\$11,500,250		APL Factor Key		Total Facility Score		42.8
APL Factor		0.8		If APL < 1,000,000 APL F = 1.20		Overall Rating		Poorer Risk <60
APL with All Recs Completed		\$1,250,000		If APL < 5,000,000 APL F = 1.00		Overall Score with Recs Compl.		61.0
APL Factor with All Recs Completed		1.0		If APL < 10,000,000 APL F = 0.90		Max Possible Score		93.0
				If APL > 10,000,000 APL F = 0.80		Max Possible Rating		Better Risk >90
						Rating Key		Better Risk >90
								Typical Risk 60-90
								Poorer Risk <60
(The total facility score is the sum of all Passive and Active scores multiplied by the APL Factor. The lower the facility's APL the greater the APL Factor.)								





## Facility Level – Recommendations

The **Recommendations** page contains all recommendation for a particular facility that are currently still active or if they have been resolved. You may view the recommendation in form or datasheet view.

Scheduling & Values		Facility Ratings		Recommendations				
GRC Loc. No.	1001.0002	Client Loc. No.	ABC0002	Latitude	44.2977	Longitude	-78.3273	
Address				469 Park Street North, Bldg 5		Division Name	Division C	
City	Peterborough	State		Country	Canada	Postal		
Location				2 of 13		Facility Name	Facility 2	
				Find		Custom Access	Demo	
<b>Recommendation Tracking</b>								
Rec. No.	2014	1	Rec. Impact	Moderate	Rec. Status	Outstanding	Status Date	03-Jul-14
Hazard	Fire	Primary Rec. Type	Human Element	Secondary Rec. Type	Self-Inspections			
Rec. Key Word								Fire Protection Equipment Inspections
Current Loss Est.		Completed Loss Est.		Est. Cost to Complete		Savings Ratio		Act. Cost to Complete
Actual								
Range	14. HE/Reliability	14. Probability Reduction		01. <1K				
Resp. Date	18-Jul-13	Resp. From	Link Recipient	Rec. Intended Action	Agree - But Action Postponed	Exp'd Compl. Date	28-Jan-14	
Facility Comment								
Mgmt. Resp. Date		Resp. From		Mgmt. Action				
Mgmt. Comment								
Edit		Delete		Record 1 of 7		Datasheet View		



## Facility Level – Menu Selector

The **Menu Selector** provides 100% navigation from any page. From the Facility level, this menu also provides all Charts & Reports and all Data Extracts.

The screenshot displays the 'ABC Company (Demo)' Fire Program interface. The 'Menu Selector' dropdown menu is open, showing options for Facility Navigation, Charts & Reports, Data Mining & Extracts, User Tools, Quick Reference, Libraries, Search Engine, Facility Level Output Reports, and Facility Level Data Extracts. The 'Facility Level Data Extracts' option is highlighted, showing a list of links: Recommendation Response, Facility Rating, Facility Rating - Chart to Report, C.O.P.E., C.O.P.E. & Recommendations, and C.O.P.E., Recommendations & Rating. The background shows the 'Scheduling & Values' section with various input fields and tables.

## Facility Level – Change Service

The **Change Service** menu allows the user to navigate from one service to the next without having to go back to the Facilities Listing grid. Simply click the drop-down menu, choose another Service, and the page will navigate to that Service, where applicable.

The screenshot displays the 'ABC Company (Demo)' Fire Program interface. The 'Change Service' dropdown menu is open, showing a list of services: Fire Protection Engineering, Boiler & Machinery Engineering, Infrared Thermographic Surveys, Jurisdictional Boiler & Pressure Vessel Inspections, Natural Hazards Analysis, and Diversified Services. The background shows the 'Scheduling & Values' section with various input fields and tables.

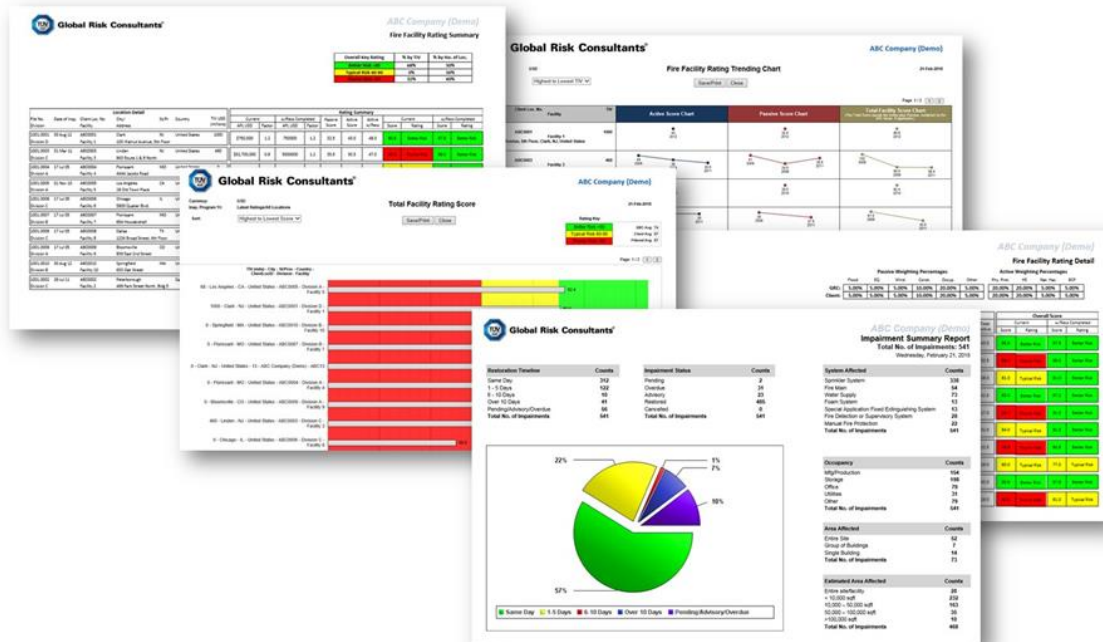




## Program Level – Charts & Reports

The **Charts & Reports** menu provides access to all output reports. Some outputs go directly to an Adobe .pdf, while others offer a Pre-Filter to narrow down the information, and others offer the flexibility to first navigate to the grid, where you can apply custom filtering and sorting, to then run the chart or report.

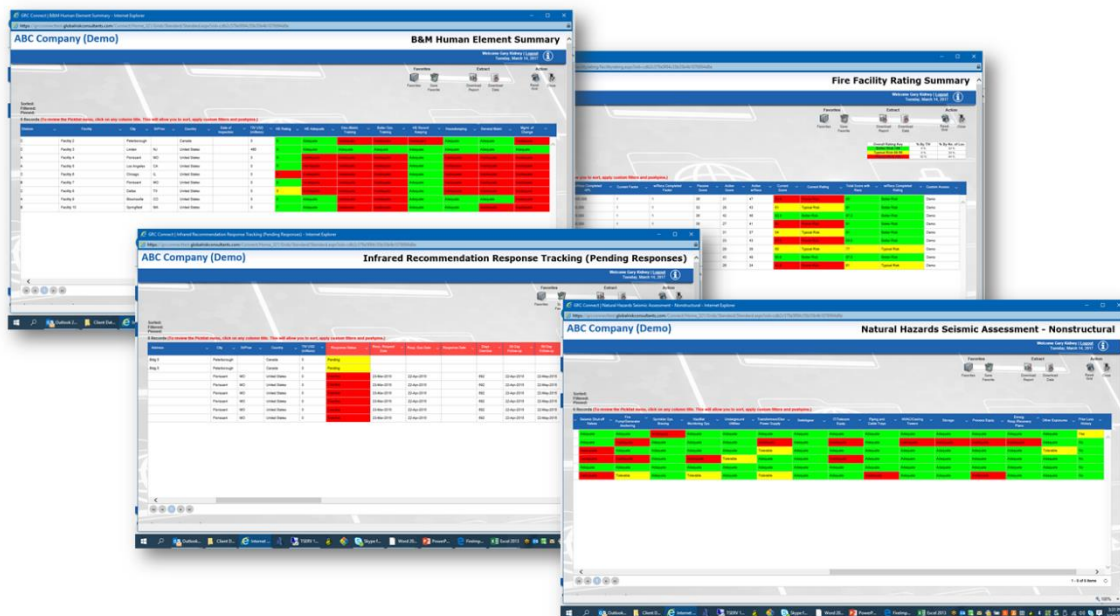
Each of the different Services offer outputs for each of the data categories, as applicable.



## Program Level – Data Mining & Extracts

The **Data Mining & Extracts** menu provides access to all of the data that is collected for each individual facility. The grids provide some simple mining capabilities with sorting, custom filters in addition to the simple Picklist menu option.

All of the grids provide easy extract into spreadsheet format, including any conditional color formatting.





## Program Level – myBatch Report!

The **Batch Reports** tool allows the user to select multiple reports, for multiple Services, then select a custom filter(s) and apply optional settings (currency/units). The system combines all selected reports in the order selected into one batched .pdf file. Once the report is compiled, the user will receive an email notification along with a link to log in and review the final report.

### ABC Company (Demo)

**Batch Reports Tool**

Process Report(s) Clear All This Batch Reports Tool allows you to select one or multiple reports for any Service below. Click in the checkbox to the left of the report title, then click the Process Report(s) button to proceed to the Filter and Settings page. There you are able to apply custom filter(s), adjust your default Currency/Units and proceed with creating your batched report.

Menu Selector Tuesday, March 14, 2017

**Fire Protection Engineering**

Inspection Details

- ☐ Inspection Frequency
- ☐ Inspection Status

Facility Ratings

- ☐ Total Facility Score Chart
- ☐ Rating Summary
- ☐ Rating Detail

C.O.P.E

- ☐ C.O.P.E Report (All Locations)
- ☐ C.O.P.E Summary
- ☐ Human Element Summary

Active Recommendations

- ☐ Active Recs By Impact
- ☐ Active Recs By Loss Estimates
- ☐ Pending Rec. Response & Follow-Up
- ☐ Active Recs By Type Chart (Primary & Secondary)
- ☐ Active Recs By Intended Action

All Recommendations

- ☐ All Recs By Status
- ☐ All Rec Resp Follow-Up
- ☐ All Recs By Intended Action

Loss Estimates

- ☐ Location Loss Estimates

Impairments

- ☐ Impairment Summary
- ☐ Impairment Summary Chart

**Boiler & Machinery Engineering**

Inspection Details

- ☐ Inspection Status
- ☐ Inspection Frequency

Facility Ratings

- ☐ Total Facility Score Chart
- ☐ Rating Summary Report
- ☐ Rating Detail Report

Facility Data

- ☐ Facility Data Report (All Locations)
- ☐ Mechanical Maintenance Summary
- ☐ Electrical Maintenance Summary
- ☐ Human Element Summary
- ☐ Facility Data Summary

Active Recommendations

- ☐ Active Recs By Type Chart (Primary & Secondary)
- ☐ Active Recs By Impact
- ☐ Active Recs By Loss Estimates
- ☐ Pending Rec. Response & Follow-Up
- ☐ Active Recs By Intended Action

All Recommendations

- ☐ All Recs By Status
- ☐ All Rec Resp Follow-Up
- ☐ All Recs By Intended Action

Loss Estimates

- ☐ Location Loss Estimates

**Infrared Thermographic Surveys**

Inspection Details

- ☐ Inspection Status
- ☐ Inspection Frequency

Equipment

- ☐ Equipment Details

Active Recommendations

- ☐ Active Recs By Type Chart (Primary & Secondary)
- ☐ Active Recs By Impact
- ☐ Pending Rec. Response & Follow-Up
- ☐ Active Recs By Intended Action

All Recommendations

- ☐ All Recs By Status
- ☐ All Rec Resp Follow-Up
- ☐ All Recs By Intended Action

**Jurisdictional Boiler & Pressure Vessel Inspections**

Objects

- ☐ Object Inventory

Recommendations

- ☐ Recommendations Summary

**Natural Hazards Analysis**

Servicing

- ☐ Inspection Frequency
- ☐ Inspection Status

Seismic Assessment

- ☐ Structural Report
- ☐ Non-Structural Report

Flood Assessment

- ☐ General
- ☐ Exp./Bldg. Structure/Other

Wind Assessment

- ☐ Bldg. Envelope
- ☐ Utilities Misc.

Active Recommendations

- ☐ Flood Active Recs By Type Chart (Prim & Sec)
- ☐ Seismic Active Recs By Type Chart (Prim & Sec)
- ☐ Wind Active Recs By Type Chart (Prim & Sec)
- ☐ Active Recs By Impact
- ☐ Pending Rec Resp & Follow-Up

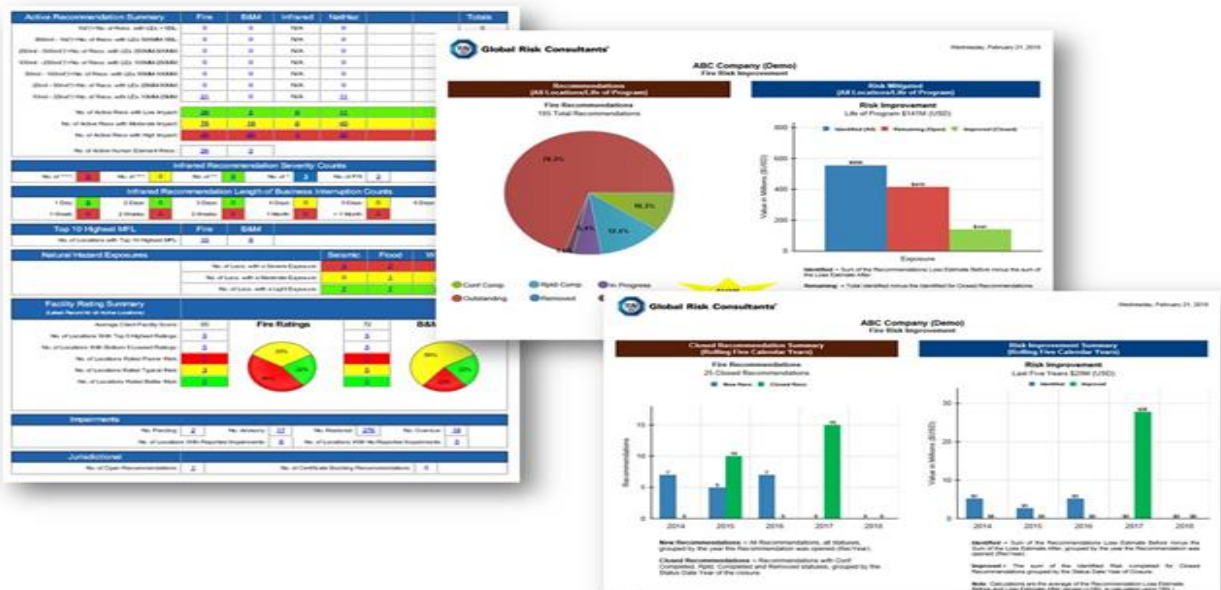
All Recommendations

- ☐ All Recs By Status
- ☐ All Rec. Resp Follow-Up

Global Risk Consultants Corp. Email Us Logout









## Program Level – Quick Reference

The **Quick Reference** menu provides access to program-wide summary output reports. The grids provide some simple mining capabilities with sorting, custom filters in addition to the simple Picklist menu option. Some outputs go directly to an Adobe .pdf, while other offer a Pre-Filter to narrow down the information, and others offer the flexibility to first navigate to the grid, where you can apply custom filtering and sorting, to then run the chart or report.



## Grid Features

Each of the data grids contains each of the same features and flexibility.

	Sort Ascending
	Sort Descending
	Filter 
	Pin
	Pick List
	Move To First
	Move To Last

**Sort:** Select checkbox to apply sort by that column in ascending or descending order.

**Filters:** From this menu you may apply custom filters by choosing the value and the selecting the criteria.

**Pin:** Clicking on Pin will freeze this column to the left side.

**Pick List:** This feature provides a dynamic selecting of items applicable within the particular column you have selected, where you can then select one or multiple options. Click the checkbox for each item you would like included, or deselect the items you want excluded. The selections at the bottom allow you to Check All, Uncheck All or Revert All.

**Move to First** – Clicking here will move the selected column to the first position.

**Move to Last** – Clicking here will move the selected column to the last position.