MetricStream

Governance, Risk, and Compliance Intelligence

USER GUIDE

RELEASE 6.1 SP3

MARCH 2015

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About This Guide

Preface

The MetricStream **Governence, Risk, and Compliance Intelligence User Guide Release 6.1 SP3** provides information on using the MetricStream **GRC Intelligence** application. The MetricStream **GRC Intelligence** application is a web-based application.

Documentation Conventions

The following conventions are used in this document.

Conventions	Description
Note:	Key pointers, in the form of notes, to help you use this application effectively and efficiently are provided throughout this guide. You can recognize a note when you come across a new paragraph in italics with the word 'Note' in red at the beginning of the paragraph. For example: *Note: This guide is not intended for system administrators of the MetricStream GRC Intelligence application.*
Boldface	All MetricStream application names, software references, and document names appear in boldface. Examples: ● Application Name: **GRC Intelligence** ● Software reference: **Comments** field
Snippet Images	Images that are partially captured are snipped off as shown below.
	References to different topics within this User Guide. For example: *For more information on the Form Tool Bar icons, refer to the Form Tool Bar section.*
	References to other MetricStream documents to get more information on the topic. For example: *For more information, refer to the MetricStream EGRCP User Guide Release 6.1 SP4.*

Target Audience

This guide is intended for users of MetricStream **GRC Intelligence** application.

*Note: This guide is not intended for system administrators of the MetricStream **GRC Intelligence** application.*

Chapter Summaries

This guide consists of the following chapters.

Chapter Title	Description
Using GRC Intelligence	Provides information on **GRC Intelligence** application overview and various work flows involved in managing surveys and other related functions.
Security Model and User Interface	Provides information on security model, roles, infocenter and info-port details and so on.
Common Functions	Provides information on the common Metric- Stream portal and **GRC Intelligence** application features.
Managing GRC Alerts	Provides information on setting-up the channels and managing alerts from various sources.
Reports	Provides information on the various reports used in the **GRC Intelligence** application.

Related Documents

You can refer to the following documents:

- MetricStream GRC Intelligence Training Guide Release 6.1 SP3
- MetricStream GRC Intelligence System Administrator Guide Release 6.1 SP3
- MetricStream GRC Intelligence Online Help Release 6.1 SP3
- MetricStream GRC Intelligence Installation Guide Release 6.1 SP3
- MetricStream Portal User Guide Release 6.1 SP4
- MetricStream EGRCP User Guide Release 6.1 SP4
- MetricStream EGRCP System Administrator Guide Release 6.1 SP4

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Using GRC Intelligence

This chapter provides an overview of the **GRC Intelligence** application and architecture.

Sections of this chapter:

1. Overview

2. GRC Intelligence Architecture

Overview

Compliance teams face extraordinary market conditions, constantly shifting regulation with multiple requirements, and increased pressure to deliver uncompromising compliance with reduced budgets and significant resource constraints. Risk is attached to every regulatory development or change in sanctions and these potential risks leave the organization vulnerable if they are not properly managed and mitigated. MetricStream **GRC Intelligence** serves as a single source for tracking regulatory alerts, rules, and taking actions on the content.

MetricStream's **GRC Intelligence** application enable users within organizations to be subscribed to regulatory feeds, which can then be retrieved in the form of alerts that can be stored or further used in workflows for action.

The **GRC Intelligence** application comprises the following key features:

- **Setup Channels** - Create channels to fetch alerts from different sources. The source data for the created channels is fetched from sources:
  - Email – An infolet is used to fetch the data from the specific mail alert inbox.
  - Really Simple Syndication (RSS) – An infolet (It is a programmatic component, that is (SQL Statements, Stored Procedures, and so on) that targets specific activities, which you want to measure, monitor, identify, and correct.)is used to retrieve the data from the specific RSS feeds.
  - GRCIntelligence.com - An API is used to validate a source (using an activation code) from the GRCIntelligence.com content server.
- **Alerts Subscriptions** - The user can **Subscribe To Alerts** from different channels, mark the relevant alerts for follow-up, and review.
- **Notify Users** - The users can notify internal or external users about the alerts. The specified users receive an e-mail notification about the alerts.
- **Initiate Issue** - The **GRC Intelligence** application is integrated with the **Issue Management** application. The user can initiate an issue for a particular alert to be tracked in the I**ssue Management** application.
- **Link Alerts to GRC Foundation Contents**: The user can link alerts to GRC Foundation contents for tracking along with the comments. This association enables you to update/modify GRC library contents that are used in workflow for other applications.

GRC Intelligence Architecture

The following figure displays the high-level architecture of **GRC Intelligence** application.

Figure 1: GRC Intelligence Architecture

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Security Model and User Interface

This chapter provides information on the security model, roles, infocenters, and infoports of the **GRC Intelligence** application.

Sections of this chapter:

1. Security Model

2. Role-Activity Mapping

3. Role-Infocenter Mapping

4. Infocenter - Content Mapping

5. GRC Intelligence > Setup Channels Infocenter

6. GRC Intelligence > My Alerts Infocenter

7. GRC Intelligence > GRCIntelligence.com Infocenter

Security Model

The **GRC Intelligence** follows three-tier structure security model as follows:

- Create roles and assign objects and activities to the roles, as required
- Create organization structure and organization-role pair
- Assign users to organization-role pair

Note: For more information on roles and related activities, refer to the Roles and Related Activities table below.

Note: To assign activities through organization-role pair, refer to the Governance Risk Compliance 6.1 System Administrator Guide.

Role-Activity Mapping

The following table lists the different roles and related activities in the MetricStream **GRC Intelligence** application.

Activities	Roles	
	GRCI Admin	GRCI User
MS RGA Alert Subscriptions		✔
MS RGA Create Channels	✔	

Legends:

- ✔: You can perform the activity
- Blank: You cannot perform the activity

Role-Infocenter Mapping

The following table lists the different roles and related infocenters in the MetricStream **GRC Intelligence** application.

Roles	Infocenter GRC Intelligence- Main ifnocenter which comprises one or more sub-infocenters.				
	My Subscriptions	**Set Up Channels**	**My Alerts**	**My Reports**	**GRCIntelligence.com**
GRCI Admin		✔			✔
GRCI User	✔	✔	✔	✔	✔

Legends:

- ✔: You can access the infocenter

- Blank: You cannot access the infocenter

Infocenter - Content Mapping

The following table provides detailed information on infocenters, infoports, forms, reports, and tasks in the MetricStream **GRC Intelligence** application.

Infoport Details	Infocenter GRC Intelligence- Main ifnocenter which comprises one or more sub-infocenters.				
	My Subscriptions	Set Up Channels	My Alerts	My Reports	GRCIntelligence.com
Manage: My Subsrip-tions link	✔				
Subscription Details Report	✔				
Channels: Create Chan-nel link		✔			
Manage Channels Report		✔			
My Alerts Report			✔		
Issue Overview Report				✔	

Legends:

- ✔: You can access the form/report/dashboard from the corresponding infoport

- **Blank** - You cannot access a form/report/dashboard from the corresponding infoport

- Shaded-Merged Row: You can view the forms/reports/dashboards by clicking the respective links in the infoport

- Shaded-Split Row: You can view the reports and charts directly in the infoport

GRC Intelligence > Setup Channels Infocenter

Use the **Setup Channels** infocenter to setup and manage channels. The channels are created to fetch the data from different sources. The user can define the channel name and other related details using the Channel form.

Figure 2: Setup Channels Infocenter

GRC Intelligence > My Alerts Infocenter

Use the **My Alerts** infocenter to create and manage your alert subscriptions, notify users, log issues for alerts, and link alerts to GRC Foundation contents.

Figure 3: My Alerts Infocenter

GRC Intelligence > My Subscriptions Infocenter

Use the **My Subscriptions** infocenter to subscribe to alerts from the available channels. This can be done by entering keywords that act as filters to segregate the content from the subscribed channel.

Figure 4: My Subscriptions Infocenter

GRC Intelligence > My Reports Infocenter

Use the **My Reports** infocenter to view the **Issue Overview** report.

Figure 5: Issue Overview Report

GRC Intelligence > GRCIntelligence.com Infocenter

Use the **GRCIntelligence.com** infocenter to login to GRC store and subscribe to required alerts from content server.
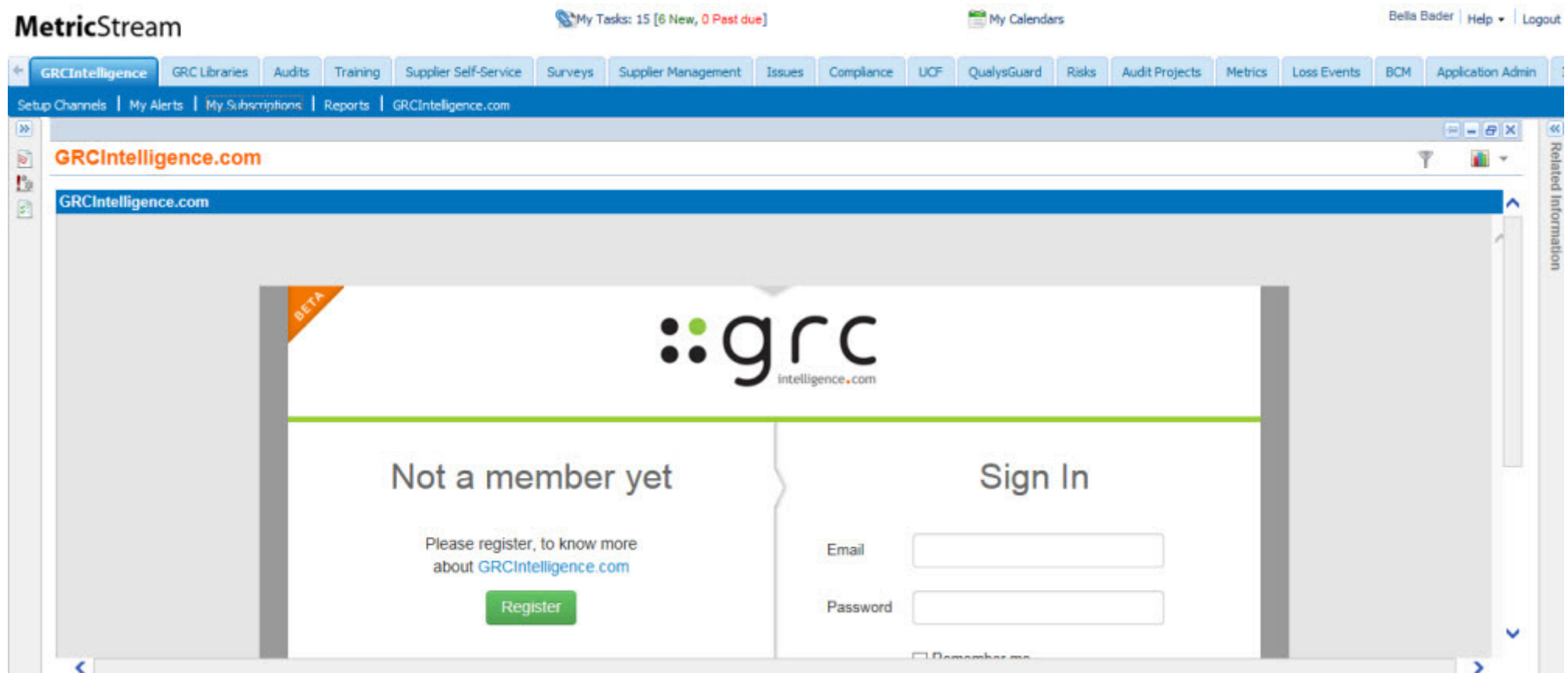
Figure 6: GRCIntelligence.com Infocenter

Common Functions

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</div>

This chapter provides information on the common functions and features of the **GRC Intelligence** application. By going through this chapter, you can understand the following:

- Different methods of accessing the **GRC Intelligence** forms.
- Common features of MetricStream applications such as form tool bar, multi-window interface, and so on.

Sections of this chapter:

1. Form Tool Bar
2. Mandatory Fields
3. Multi-Window Interface
4. Relationships Tab > Tabular Format Functionality
5. E-Mail Notifications

Form Tool Bar

The forms available in the **GRC Intelligence** application include a common tool bar, which comprises a set of icons to perform certain actions. The below table provides a list of form tool bar icons and their descriptions.

Note: These are the standard form tool bar icons available across all the MetricStream applications. However, all the icons may not be available in all the forms. The display of these icons is customized based on the function and usage of the form.

Icon	Click the Icon to...
✔ **Submit**	Submit the contents of the form and route to the next workflow step based on the action selected.
💾 **Save Draft**	Save the contents of the form as a working draft for the user without processing it to the next workflow step and keep the form open.
💾 **Save Draft & Close**	Save the contents of the form as a working draft for the user without processing it to the next workflow step and close the form. *Note: You can access the form from My Tasks at a later time and continue working.*
📋 **View Reports**	View reports related to the current form. *Note: After you click this icon, a list of reports appears. Click the required report name to view the details.*
🖨 **Print**	Print the contents of the form. After you click this icon, the contents of form open in PDF format. To print the contents, perform the following steps: 1. Click the Print icon 🖨 . OR 1. Save the contents and close the file. 2. Re-open the file from the saved location. 3. On the **File** menu, click the **Print** button.
✖ **Cancel**	Discard changes made to the form and close it.

Mandatory Fields

While working on the **GRC Intelligence** forms, you may come across certain fields marked with a red asterisk ＊. The red asterisk indicates that the field requires a mandatory input. If you click the Submit icon without providing inputs even in one of the mandatory fields, the application displays an alert message. To submit the form, you must fill in the mandatory fields.

Channel Name*

Figure 7: Sample Mandatory Field

Multi-Window Interface

Multi-window interface feature enables you to open one or more windows simultaneously within the main window of the MetricStream portal. This helps you to work on multiple pages without closing the page that is currently open.

User Interface Options

To work on multi-window interface, use the icons available on the upper-right corner of the Metric-Stream portal.
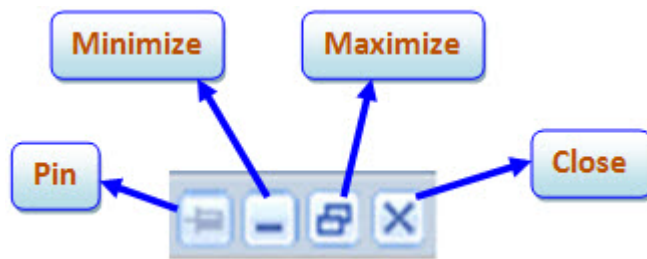
Figure 8: User Interface Options

Refer to the following table for multi-window icon descriptions.

Icon	Click the icon to...
	Pin your current working window and open multiple windows simultaneously. **Note:** *After you click the Pin icon, the Unpin icon appears.* **Note:** *By default, the maximum number of windows that you can pin is three. However, this is configurable.* **Note:** *When a user opens a form, report, or an infocenter, and subsequently clicks another form, report, or an infocenter without pinning the first one, the latter replaces the former.*
	Unpin the pinned window.
	Minimize the window.
(this icon interchanges with)	Maximize the window.
(this icon interchanges with)	Restore the window.

Icon	Click the icon to...
✖	Close the window.

For more information, refer to the MetricStream EGRCP User Guide Release 6.1 SP4.

The following figure shows multi-window interface.
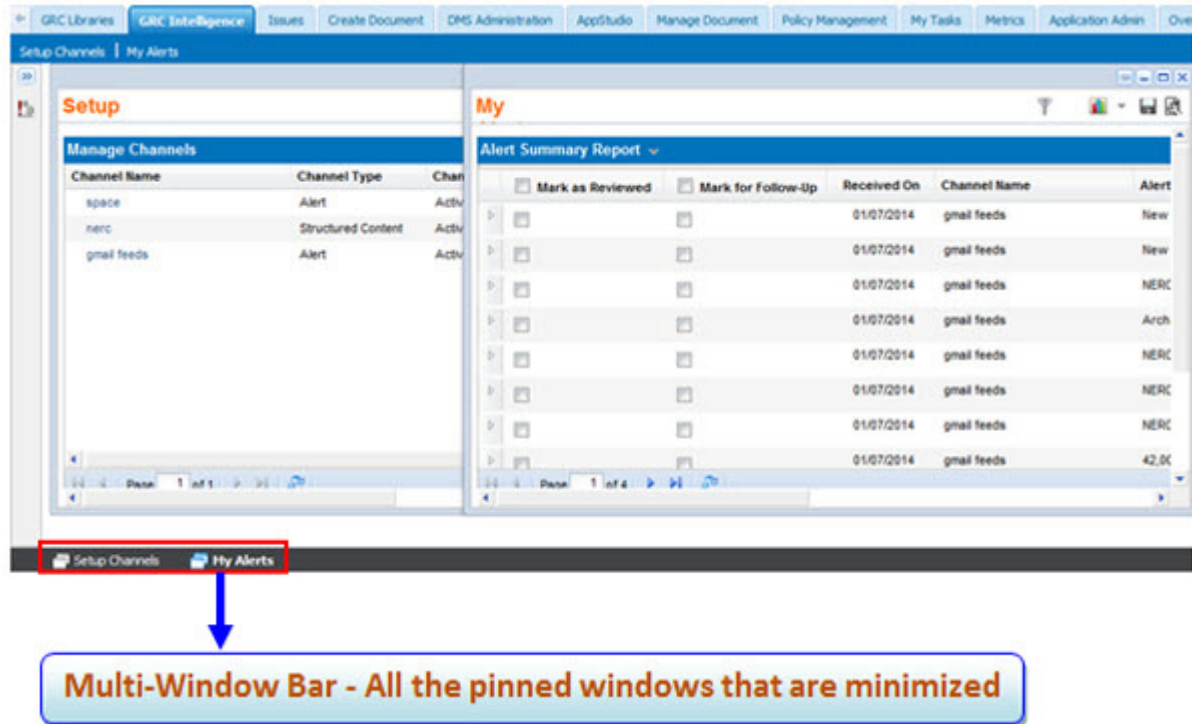
Figure 9: Multi-Window Display

Multi-Window Bar > Context-Sensitive Menu Options

The context-sensitive options allow you to switch from one window to another. To view the context sensitive options, right-click the required window on the multi-window Bar. The context-sensitive menu options are available/unavailable based on the function that you perform in the user interface options. For example, if you have clicked the Minimize icon in the user interface options, the Minimize option is unavailable in the context-sensitive menu options and vice versa. The following figure shows the context-sensitive options.
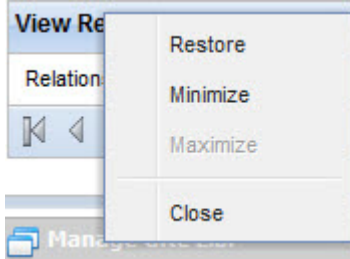
Figure 10: Context-Sensitive Menu Options

For more information on the user interface options, refer to User Interface Options section.

For more information on the context-sensitive options, refer to the MetricStream EGRCP User Guide Release 6.1 SP4.

Note: To view the pinned window, you may also click the respective window in the multi-window Bar of the application.

Refer to the following table for context-sensitive menu options and their descriptions.

Option	Select the Option to...
Restore	View the pinned window. *Note: This option is unavailable if you have already restored the pinned window. However, this option is available again if you minimize or maximize the restored window.*
Minimize	Maximize the window. *Note: This option is unavailable if you have already minimized the window using the User Interface options.*
Maximize	Minimize the window. *Note: This option is unavailable if you have already maximized the window using the User Interface options.*
Close	Close the window.

Relationships Tab > Tabular Format Functionality

The following section describes the Relationships tab functions of the **Link Alerts to GRCF Objects** form.

The values in this tab are populated from the MetricStream **GRC Foundation** application.
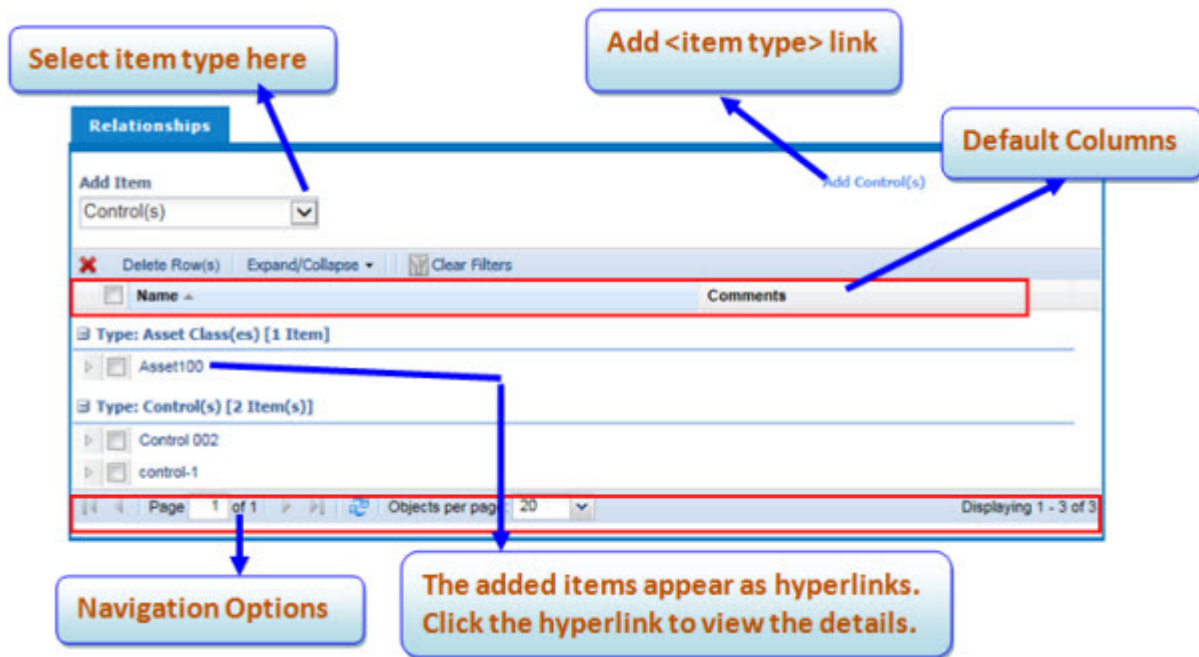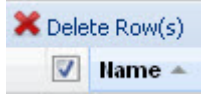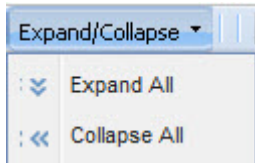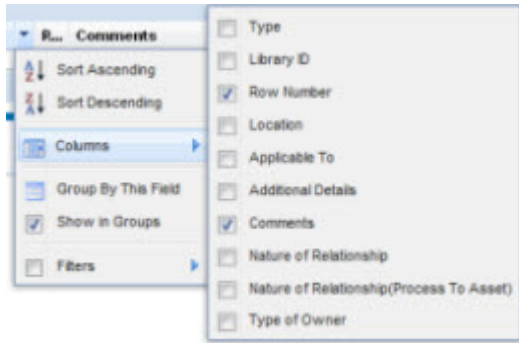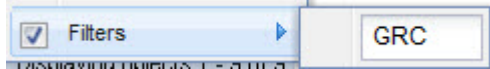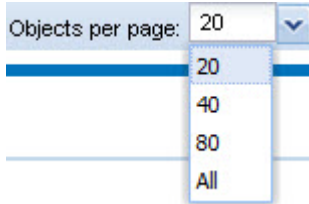
Figure 11: Relationship Tab > Tabular Format Functionality

Option	Description
	To delete a particular row, select the check box in line with the row that you want to delete and click the **Delete Row(s)** button. To delete all the rows, select the check box in line with the **Name** column (this action selects all the added items), and then click the **Delete Row(s)** button.
	To expand or collapse the item details, click the drop-down list. The following options are available: ● **Expand All**: To expand the item details such as ID, Owners, and so on of the associated contents, select this option. You can see the corresponding item details. The minus icon next to the item type indicates that the item details are expanded. Click this icon to collapse the item details. ● **Collapse All**: To collapse or hide the item details such as ID, Owners and so on of the associated contents, select this option. The item details are hidden. The plus icon next to the item type indicates that the item details are collapsed. Click this icon to expand the item details.

Option	Description
	By default, the **Name**, **Row Number**, **Applicable To**, and **Comments** columns are displayed. However, the display of columns is configurable. To configure the columns, click the ▼ downward-arrow. The drop-down is available only when you move the pointer on the default columns. *Note: You cannot hide the Name column in the grid.* The following options are available: • **Sort Ascending**: To sort the items in alphabetical order, select this option. • **Sort Descending**: To sort the items in the reverse alphabetical order, select this option. • **Columns:** To display or hide columns, move the pointer over the Columns option. You can view the list of column names. Select the column name check boxes that you want to display and clear the column name check boxes that you want to hide. The selected columns appear and the cleared columns are hidden. • **Group By This Field**: By default, the rows are grouped based on the item type selected in the **Add Items** field. To display the rows based on the column name, select this option. For example, to display rows based on the location, select the Group By This Field option by clicking the ▼ downward-arrow in the Location column. • **Show in Groups:** To group the rows based on the item types, select this option. The item types are merged and displayed in the order in which they are added. *Note: However, to view the items in the order in which they are added, you must refresh the browser and clear the Cache files.* • **Filters**: To display the item types based on search criteria, select this option. When you select the Filters check box, a free text entry box appears next to the Filters check box. Type any key alphabet, numeral, alphanumeric, or word. The grid displays the item types based on the entered search criteria. *Note: The Filters option is available only when you click the ▼ downward-arrow in the **Names** column.*

Option	Description
![icon] (appears to the left of the item type and is interchangeable with the Collapse icon ![icon])	To expand the item type and see the item name, click this icon.
![icon] (appears to the left of the item type and is interchangeable with the Expand icon ![icon])	To collapse the item type, click this icon.
![icon] (appears to the left of the item name and interchanges with the Collapse icon ![icon])	To expand the item name and see the details, click this icon
![icon] (appears to the left of the item name and interchanges with the Expand icon ![icon])	To collapse the item details, click this icon.
![icon]	To navigate to the first page, click this icon.
![icon]	To navigate to the previous page, click this icon.
Page 1 of 1	To navigate to a different page, enter the page number in the Page field and press Enter on the keyboard.
![icon]	To navigate to the next page, click this icon.
![icon]	To navigate to the last page, click this icon.
![icon]	To refresh the grid, click this icon.
Clear Filters	To clear data entered in the filters, click this icon.
Objects per page: 20 / 20 / 40 / 80 / All	You can choose to display all or specific number of records on a page. • To display all the records, select the **All** option from the list. • To display specific number of records, select the required number of records from the list.

E-Mail Notifications

The following table lists the e-mail notifications that are triggered in the **GRC Intelligence** application.

To	Content	Sent When the...
GRCI User	Alert message	User receives an alert through the subscribed channel.
GRCI Admin, GRCI Other users	Dear [User name]: This is to notify you that "[Channel - XXXXXX"] has been created.	User notifies the internal and external users of the system in the 'Notify Users' in the Alerts
Issue Owner	Dear [User name]: This is to notify you that an Issue "[Issue - XXXXXX"] has been assigned to you for your action. 　　Issue Title<> 　　Issue Rating<> Issue Due By<> Owner Organization<> <Link to Assignment>	Issue is created for an alert and assigned to the Issue Owner
Issue Approver	Dear [User name]: This is to notify you that an Issue "[Issue - XXXXXX"] has been assigned to you for your action. 　　Issue Title<> 　　Issue Rating<> Issue Due By<> Owner Organization<> <Link to Assignment>	Issue is assigned to the Issue Approver

Managing GRC Alerts

This chapter provides information on setting up channels, managing alert subscriptions, notifying users, and so on.

Sections of this chapter:

1. Creating/Managing Channels

2. Subscribing to Alerts

3. Notifying Users

4. Logging Issues

5. Linking Alerts to GRC Library Contents

Creating/Managing Channels

Using the **Channel** form, the GRC Intelligence administrator can create a channel, which fetches the feeds from external sources such as RSS URLs, GRC Intelligence content server and e-mail servers. You can create alert channels, which fetches the feeds from the specific mail alert in-boxes or structured contents/ GRC intelligence server. You can also specify the key words while creating the channels to fetch the related key word alerts from various sources. The users can subscribe to alerts from available channels. Using this form, you can create the following type of channels:

● Alerts: This type of channel retrieves the alerts from specified mail alert inbox.

● Structured Content: This type of channel retrieves the XML or CSV or any tagged content files though e-mails, FTP path, and websites.

● GRCIntelligence.com: This type of channel retrieves the alerts from the sources subscribed by the user using GRCIntellignece.com store. The content is delivered using the content server managed by MetricStream.

Navigation

To access the **Channel** form, perform the following steps:

Step 1	Click **GRC Intelligence** infocenter >> **Setup Channels** sub-infocenter.
Step 2	Click **Create Channel** link.
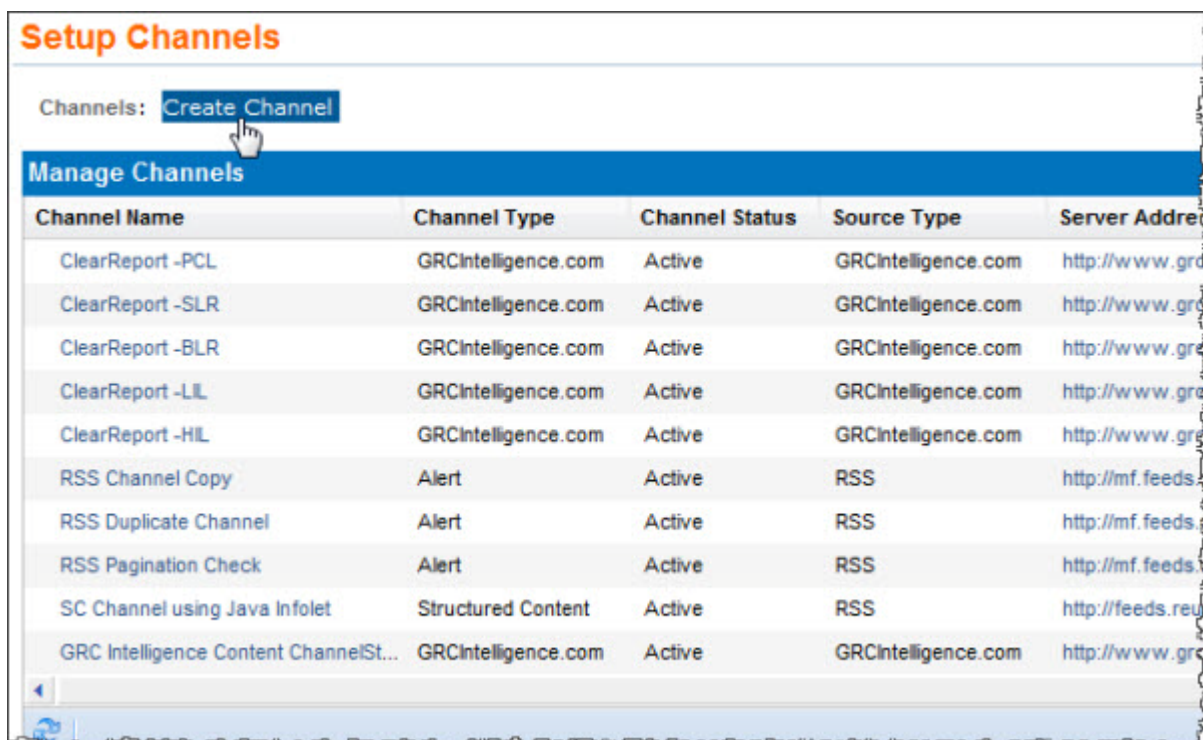
Figure 12: Accessing Channel Form

Channel Form

Use the **Channel** form to create the channel which fetches the alerts from various sources.

Figure 13: Channel Form

Channel Form > Header Section

Use the header section to enter the channel name, type, and status of the channel.

Channel: NYSE Feed

Channel Name*
NYSE Feed

Channel Type*
Alert

Channel Status*
Active

Figure 14: Channel Form > Header Section

Field/List Name	Description
Channel Name	Type the name of the channel. **Note:** *You must enter a unique name.*
Channel Status	Select the status of the channel. The following options are available in this field: ● **Active** - To activate the channel, select this option. ● **Inactive** - To deactivate the channel, select this option. **Note:** *If you deactivate current channel, the users subscribed to this channel no longer receive the alerts.*
Channel Type	Select the type of channel. Specify whether the content is of alert that is delivered in inbox of the business user or of type structured content that can be auto-processed using a structured content handler Infolet. The following options are available: ● **Alert:** Use this option when the content is unstructured and requires manual intelligence to process content and take action. ● **GRCIntelligence.com**: Use this option when an API is used to validate a source (using an activation code) from the GRCIntelligence.com content server. ● **Structured Content:** Use this option when the content consists of a definite structure (like XML, CSV and so on) and a well written parser can process the content. ● **Note:** *The sources of feed for alerts are e-mail and Really Simple Syndication (RSS).*

Channel Form > Source Details Tab

Use the **Source Details** tab to enter the source details of the channel. The fields in this tab vary based on the Type of channel that your are creating.
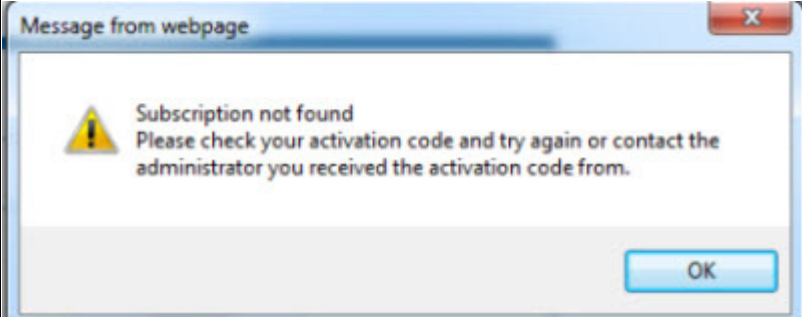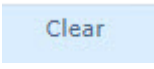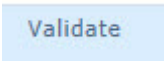
Figure 15: Channel Form > Source Details Tab > Alerts Type

Figure 16: Channel Form > Source Details Tab > GRCIntelligence.Com Related Fields

Field/List Name	Description
Add Source link	To add a new source for this channel, click the **Add Source** link. The source related fields appear. To add additional sources, click this link as many times as required.
Source	Select the source of feeds for the current channel. The following options are available in this field: ● **Email** -If the source of the feed is e-mail, select this option. ● **RSS** - If the source of the feed is RSS, select this option.
Server Address/URL	Type the server address or Uniform Resource Locator (URL) address from which the content is collated. *Note: This field accepts alpha numeric values.*
User Name	Type the user name of the source user. *Note: This field is mandatory only when you select the value **Email** in the **Source** field.* *Note: This field is optional when you select the value **RSS** in the **Source** field.*

Field/List Name	Description
Password	Type the e-mail password of the user. *Note: This field is mandatory only when you select the value **Email** in the **Source** field.* *Note: This is an encrypted field and the value that you enter appears as encrypted text.*
Email From (appears only if you select the value **Email** in the **Source** field)	Type the original e-mail ID of the content.
Server Parameter(s)	Type the source server parameter. Some servers may require additional parameters to grant access to the external application. The parameter includes whether the site is a secured or unsecured site, port numbers, and so on or not. For example, a secured connection to a POP3 server like www.gmail.com might require "mail.pop3.ssl.enable=true" as a server parameter. For example, an unsecured connection to a POP3 server is "mail.pop3.ssl.enable=false" as a server parameter. *Note: This field accepts special characters and alpha numeric values.*
Validate Source	Use this button to verify whether the connection to the Source is successfully established or not. After entering the source data, once you click this button, if the connection to the source is not established, the system displays the related error messages. However, you can submit the form without validating the source that you have entered.
Keyword(s) (Comma Separated)	Type one or more keywords based on which the incoming content needs to be filtered. *Note: You can enter multiple keywords. Use comma to separate the keywords.* *Note: The key words entered in this field act as a filter.*
Delete Last Source link	To delete the last added source, click this link. The last added source is deleted.
Delete check box	To delete a particular row, select the **Delete** check box corresponding to the row that you want to delete. The selected row is highlighted. After you submit the current form, the highlighted row is deleted.
The following section describes the fields when are configuring the source for GRC Intellignce.com channel type.	

Field/List Name	Description
Row#1: (read-only)	The sequence number of the row appears. After you activate the channel by specifying the code, this field is updated with the category details of the source.
Activation Code	Enter the activation code provided by MetricStream to activate and subscribe to the GRCIntelligence channel that you are creating. The activation code is valid for five days; you need to use the activation code before five days to activate the subscription. If you use the expired activation code, the application displays the following error message: ![Message from webpage dialog showing "Subscription not found. Please check your activation code and try again or contact the administrator you received the activation code from." with an OK button] You need to contact MetricStream or your system administrator to get the new activation code. The specific activation code is valid for only for one server instance. If you are using multiple servers, you need to use different codes for activating the same source channels. The activation code is combination of alphabets and numbers. For example: a543468a-a7af-4ede-bc06-286af5fef043
Validate button (this button interchanges with Clear button)	To activate the channel. perform the fowling steps: 1. Enter the activation code in the **Activation Code** field. 2. Click the **Validate** button. On successful validation, the **Subscription Details** section appears displaying the source details.
Clear button (this button interchanges with Validate button)	To clear the entered data in the activation code, click this button. After you click this button, the **Subscription Details** section is made unavailable. You need to re-enter the activation code and validate the source details.
Subscription Details **The following non-editable fields are displayed after you validate the activation code for a particular source for a GRCIntellignce.com channel type. The details are retrieved from the Content server which is managed by MetricStream.**	
Content Type (read-only)	The type of content that is retrieved by the source appears.
Content Category (read-only)	The category of the content retrieved by the source appears.
Delivery Schedule (read-only)	The frequency set for retrieving the source alerts appear.

Field/List Name	Description
Delivery Format (read-only)	The mode in which the content is delivered appears.
Expiry (read-only)	The date on which the source channel expires appear.
Subscription Status (read-only)	The status of the content subscription appears. The following are the statuses: ● **Subscribed**: This status is displayed when you activate a source and validate the code. ● **Expired**: This status is displayed when you enter a expired code for validation. You need to contact your system administrator to get a new activation code.

Channel Form > Structured Content Details Tab

Use the **Structured Content** tab to add the structured content details for the channel.This tab appears only if you select **Structured Content** in the **Channel Type** field. Using this tab, you can

A structured content refers to the content that is retrieved in a specific format. There are regulatory intelligence providers in the market who provide regulatory updates such as a new regulation and related information in structured content format. The structured content functionality enables you to configure, fetch, process, and act on structured content through structured content handler infolet. The SQL and JAVA infolets are used to manage the structured content from the various sources. The logic of the infolet is written based on the structured content that needs to be processed.

Figure 17: Channel Form > Structured Content Details Tab

Field/List Name	Description
Structured Content Handler Infolet	Select the corresponding structured content handler infolet. The infolet has the logic to process the incoming content and take necessary action. Actions can be Logging an issue, creating a GRC Foundation content, notifying users, and so on.

Field/List Name	Description
Save Attachment(s) check box	Use this check box to indicate whether you want to save the structure content attachments in the server or not. ● If you want to save the structured content related attachments in the ECP_Home%/Systemi/Systemi/attachments installation folder path, select this check box. ● If you do not want to save the structured content related attachments in the ECP_Home%/Systemi/Systemi/attachments installation folder path, clear this check box This option enables you to utilize the disk space appropriately, if no attachments are retrieved through a channel.
Notify User(s)	
Content Processing Unsuccessful	Select the users who need to be notified about the failure of processing the structured content. All the users selected in this field receive an e-mail notification, if the content processing is not successfully processed by the infolet.

Form Submission

To submit the current form, click the Submit icon.

For more information on the Form Tool Bar icons, refer to the Form Tool Bar section.

Task Assignments and E-mail Notifications

After you submit the current form, no task assignments or e-mail notifications are generated.
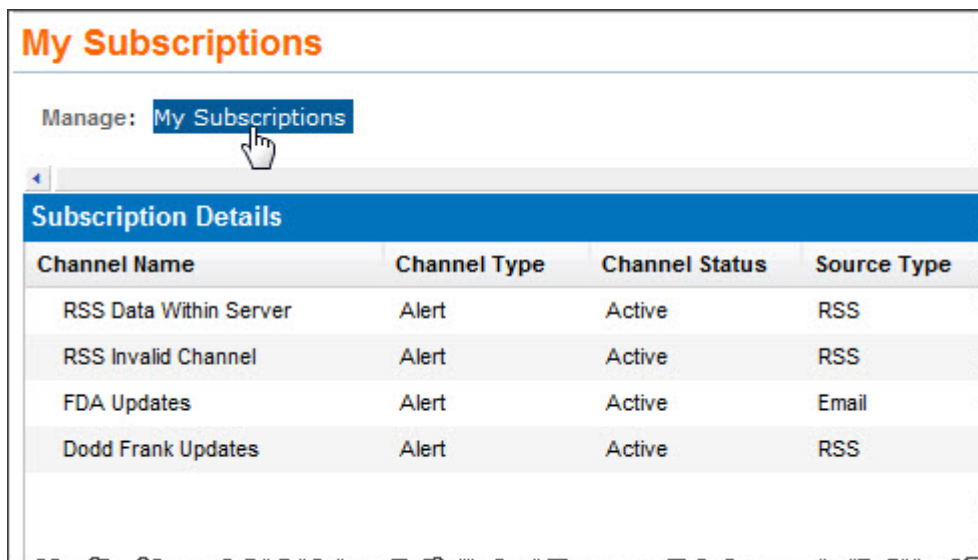
Subscribing to Alerts

Using the **My Subscriptions** form, you can subscribe to alerts from the available channels by entering keywords that act as filters to segregate the content from the subscribed channel. You can also opt for e-mail notification functionality by selecting the **Notify by Email** option from the subscribed channel. The user receives an e-mail notification with the feed content and attachments, if any, after the new updates are available in the channel.

Navigation

To access the **My Subscriptions** form, perform the following steps:

Step 1   Click **GRC Intelligence** infocenter >> **My Subscriptions** sub-infocenter.

Step 2   Click **My Subscriptions** link**.**

Figure 18: Accessing My Subscriptions Form

My Subscriptions Form

Use the **My Subscriptions** form to subscribe to alerts from various channels.

Figure 19: My Subscriptions Form

Field/List Name	Description
My Subscriptions	
Add Channel link	To add a new channel that you want to subscribe, click this link. The channel related fields appear. To add additional channels, click this link as many times as required.
Row# (read-only)	The row number appears.
Channel Name	Select the channel name that you want to subscribe to. *Note: If you select the same channel for the second time, the system displays an error message.*
Filter Keyword(s)	Enter the keyword for subscription. *Note: The keywords entered in this field act as a filter.* *Note: You can enter multiple keywords. Use comma to separate the keywords.*
Notify by Email	To receive an email notification from the subscribed channel select **Yes** or else **No**.
Status	Select a value from the **Status** field. The available options are: ● Subscribe - Select this option if you want to subscribe to the selected channel. ● Unsubscribe - Select this option if you want to unsubscribe from the selected channel.

Field/List Name	Description
Delete Last Channel link	To delete the last added channel details, click this link. The last added channel is deleted.
Delete check box	To delete a particular row, select the **Delete** check box corresponding to the row that you want to delete. The selected row is highlighted. After you submit the current form, the highlighted row is deleted.

Form Submission

To submit the current form, click the Submit icon.

For more information on the Form Tool Bar icons, refer to the Form Tool Bar section.

Task Assignments and E-mail Notifications

After you submit the current form, no task assignments or e-mail notifications are generated.

Notifying Users

Using the **Notify Users** form, you can notify internal and external users about a particular alert.

Navigation

To access the **Notify Users** form, perform the following steps:

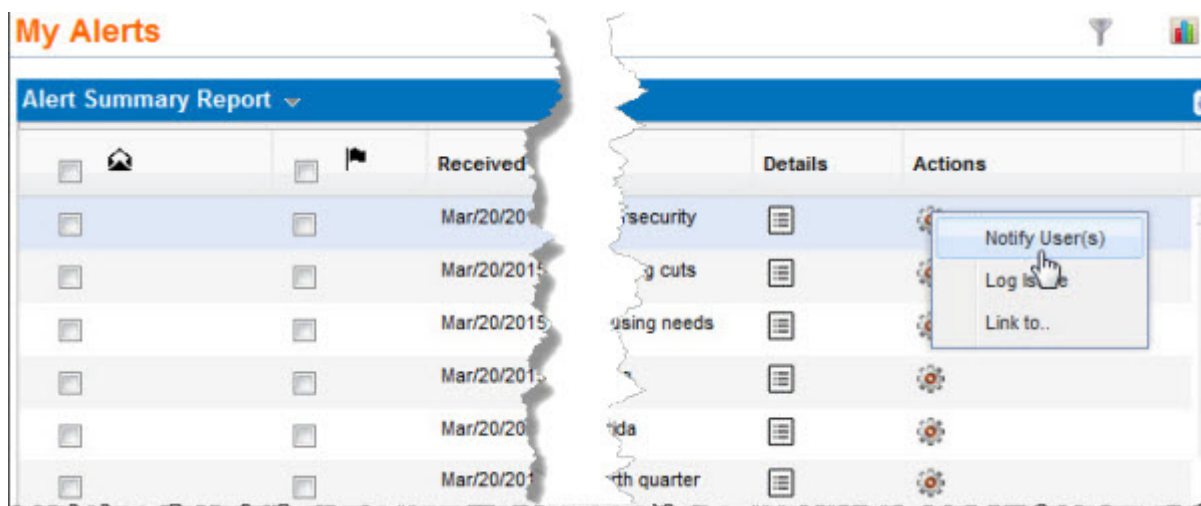**Step 1**   Navigate to the **Alerts Summary Report** in the **My Alerts** infocenter.

Figure 20: Accessing the Notify Users Form

Step 2	Click the **Notify User(s)** link.

The **Notify User(s)** form appears.

*Note: If the **Notify Users about** form does not display on clicking **Notify User(s)** link, then click **Allow Pop Ups** to display the form.*

Notify Users Form

Use the **Notify Users** form to notify the users about the alerts.

Notify Users about: :FW: mail credentials

Notify Users

Alert title*	Channel Name*	Received On*
FW: mail credentials		02/05/2014

Notify System Users 🔍

Notify Other Users (Comma Seperated Emails)

Figure 21: Notify Users Form

Field/List Name	Description
Notify Users	
Alert title (read-only)	The alert name appears.
Channel Name (read-only)	The channel name from which the alert is received appears.
Received On (read-only)	The alert received date appears.
Notify System Users	Select the users within the system who need to be notified about the selected alert.
Notify Other Users (Comma Separated Emails)	Enter the mail ids of the other users who are not part of the system and who need to be notified about the selected alert.

Form Submission

To submit the current form, click the Submit icon.

👉 *For more information on the Form Tool Bar icons, refer to the Form Tool Bar section.*

Task Assignments and E-mail Notifications

After you submit the current form, the following assignments and e-mails are generated.

Assignment Made To The…	When you select the Option/ User …	Form Assigned…	Email Sent To The…
Not applicable	All the users selected/entered in the **Notify System Users** and **Notify Other Users** fields.	Not applicable. The selected users receive the alerts.	All the users selected/entered in the **Notify System Users** and **Notify Other Users** fields.

Logging Issues

Using the **Log Issues** form, you can log an issue about the particular alert from the subscribed channel. You can select the issue owner and the selected issue owner receives an assignment to implement the action items for the specified issue. To generate the issues, the GRC Intelligence application must be integrated with the **Issue Management** application.

Navigation

To access the **Log Issues** form, perform the following steps:

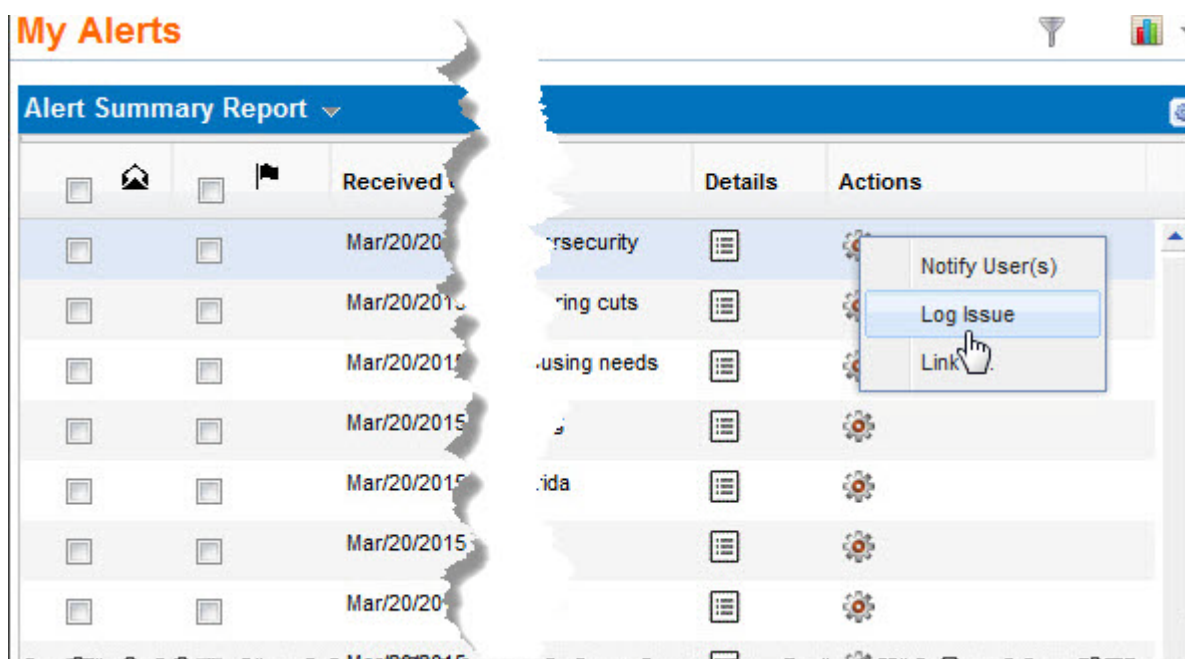**Step 1**   Navigate to the **Alerts Summary Report** in the **My Alerts** infocenter.

Figure 22: Accessing Log Issues Form

Step 2   Click the **Log Issues** link.

The **Log Issues** form appears.

*If the **Log Issues** form does not display on clicking **Log Issue** link, then click **Allow Pop Ups** to display the form.*

Log Issues Form

Use the **Log Issues** form to initiate issues regarding an alert.

Figure 23: Log Issues Form

Log Issues Form > Issues Tab

Use the **Issues tab to initiate issues for an alert.** You can add any number of issues. You must add one issue for an alert.

The **Issues** tab is organized in a tree structure.

The hierarchical level of the tree structure is as follows:

● Hierarchical Level 1 -Issue

Tree Structure Options

In the hierarchical levels of the tree structure, a set of context-sensitive menu options, icons, and links are available.

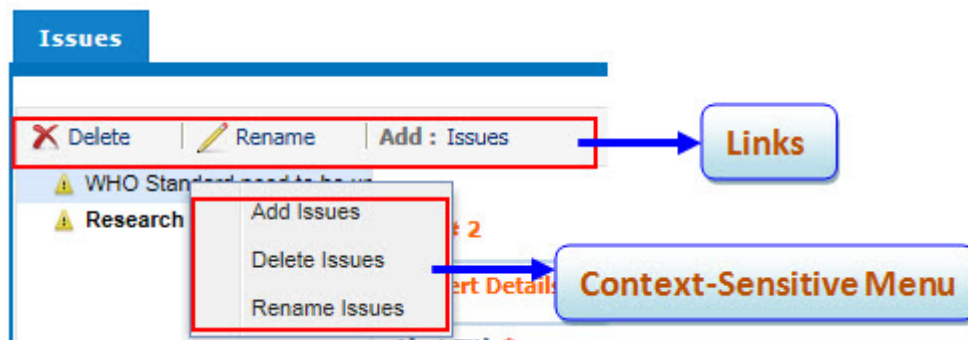The following figure shows the tree structure options available in the **Issues** tab.

Figure 24: Issues Tab > Tree Structure Options

The following table describes the tree structure options.

Tree Structure Options	Description
Context-Sensitive Menu Right-click the Issue hierarchical level to see the options.	
Add Issues	To add a new issue, select this option. An Issue is added at the hierarchal level where the pointer is positioned. ***Note:*** *By default, one blank Issue is always available in the Issue tab.* ***Note:*** *Alternatively, you can click the **Issues** link.*
Delete Issues	To delete an issue, select this option. An issue is deleted at the hierarchal level where the pointer is positioned. ***Note:*** *Alternatively, you can click the **Delete** link.*
Rename Issues	To rename an issue, select this option. ***Note:*** *The issue where the pointer is positioned can be edited.* ***Note:*** *Alternatively, you can click the **Rename** link.*

Tree Structure Options	Description
Links	
Delete (this link is followed by the Delete icon ❌)	To delete a particular section/sub-section, click this link. ***Note:*** *The section or sub-section where the pointer is positioned is deleted.*
Rename (this link is followed by the Edit icon ✏)	To rename or edit the details of a particular section/sub-section, click this link. ***Note:*** *The section or sub-section where the pointer is positioned can be edited.*
Issue (this link is preceded by 'Add')	To add a new section, select this option. A section is added at the hierarchal level where the pointer is positioned. ***Note:*** *Alternatively, you can select the 'Create Section' option from the context-sensitive menu.*

Figure 25: Log Issues Form > Issues Fields

Field/List Name	Description
Alert Details Use this section to view the alert details for which the issue is logged.	
Alert Title (read-only)	The alert title appears. *Note: The system populates this value from the Alert.*
Channel Name (read-only)	The name of the channel from which the alert received appears. *Note: The system populates this value from the Alert.*
Received On (read-only)	The date on which the alert is received appears. *Note: The system populates this value from the Alert.*

Field/List Name	Description
Issue Title Use this section to enter the details of the issue.	
Issue Title	Type the name of the issue noticed regarding the alert.
Issue Rating	Select the rating for the recorded issue. You can rate the finding as **High**, **Medium** and **Low** based on the severity of the issue.
Issue Type	Select the type of issue that you are raising. An organization can have different categorization for issues. You need to select the relevant issue type.
Exception Type	Use this field to specify the type of exception. The following options are available: ● **Design Exception** - If the issue is design based, select this option. ● **Operating Exception** - If the issue is process based, select this option. ● **Design & Operating Exception** - If the issue is process and design based, select this option.
Issue Details	Type the description about the issue. To type details in the **Rich Text Format** (RTF) window, do the following: 1. Click the RTF icon . The RTF window appears. 2. Type the required details. 3. Save and close the RTF window. The details that you typed in the RTF window appear in this field. *For more information on RTF functions, refer to the MetricStream Portal User Guide Release 6.1 SP4*
Resolution and Issue Due Date	
Issue due Date	Enter the date by which the issue must be addressed. You can enter any future date in this field. ***Note:*** *Use MM/DD/YYYY format to enter the date.*
Recommendation	Use this field to provide your recommendation regarding the issue. To type details in the RTF window, do the following: 1. Click the RTF icon . The RTF window appears. 2. Type the required details. 3. Save and close the RTF window. The details that you typed in the RTF window appear in this field. *For more information on RTF functions, refer to the MetricStream Portal User Guide Release 6.1 SP4*
Ownership Use this region to select the owners of the issue.	

Field/List Name	Description
Owner Organization	Select the organization responsible for maintaining this issue. This is not the set of organizations that this issue applies to.
Issue Owner	Select the owner of this issue. After you submit the current form, the selected issue owner receives an assignment to review the issue.
Approver Organization	Select the organization to which the approver belongs to.
Issue Approver	Select the approver for the current issue. On submission of the issue, the selected approver receives an assignment to approve the issue.

Form Submission

To submit the current form, click the Submit icon.

👉 *For more information on the Form Tool Bar icons, refer to the Form Tool Bar section.*

Task Assignments and E-mail Notifications

After you submit the current form, the following assignments and e-mails are generated.

Assignment Made To The…	When you select the Option/ User …	Form Assigned…	E-mail Sent To The…
Issue Owner	Issue owner selected in the **Issue Owner** field	Issue	Issue owner

Linking Alerts to GRC Library Contents

By using the **Link Alerts to GRCF Objects** form, you can:

● Link alerts to one or more associated GRC library contents of **GRC Foundation** application

● Provide comments regarding the association

You can use the **Alert Summary Report** to view the associated GRC library contents for an alert and change the association, as required.

Navigation

To access the **Link Alerts to GRCF Objects** form, perform the following steps:

Step 1   Navigate to the **Alert Summary Report** in the **My Alerts** infocenter.
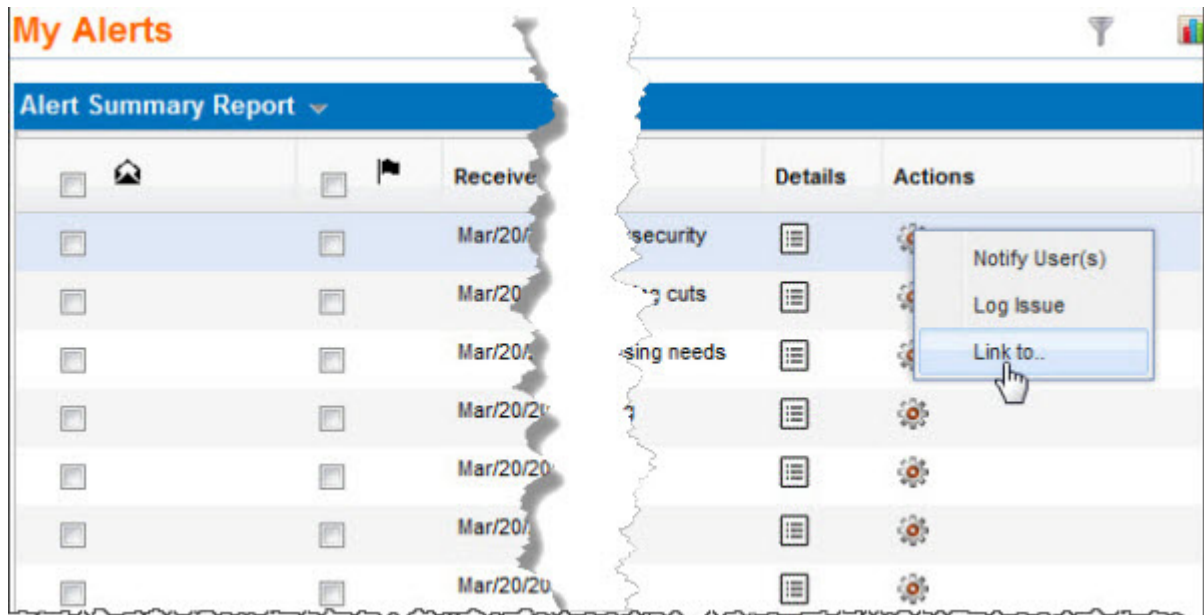
Figure 26: Accessing Link Alerts to GRCF Objects Form

Step 2   Click the **Link to** link.

The **Link Alerts to GRCF Objects** form appears.

*Note: If the **Link Alerts to GRCF** form does not display on clicking **Link to...** link, then click **Allow Pop Ups** to display the form.*

Link Alerts to GRCF Objects Form

Use the **Link Alerts to GRCF Objects** form to link the required GRC library content to alerts.

Figure 27: Link Alerts to GRCF Objects Form

Link Alerts to GRCF Objects > Header Section

Use the header section to view the alert details.

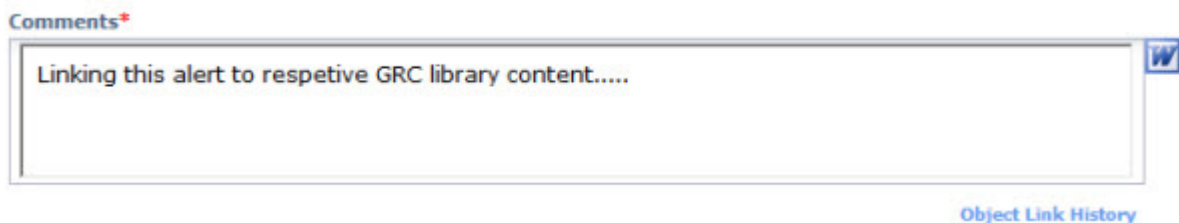*Figure 28: Link Alerts to GRCF Objects > Header Section*

Field/List Name	Description
Alert Title (read-only)	The name of the alert title for which you are linking the GRC library content appears.

Link Alerts to GRCF Objects > Relationships Tab

Use the **Relationships** tab to associate the current alert with other GRC library contents. The GRC library contents in this tab are populated from the **GRC Foundation** application.

Figure 29: Link Alerts to GRCF Objects > Relationships Tab

Field/List Name	Description
Add Item	Use this field to add GRC library contents associated with the current alert. The following options are available: ● **Area(s) of Compliance** ● **Asset Class(es)** ● **Asset(s)** ● **Control(s)** ● **Financial Account(s)** ● **Framework Reference(s)** ● **Function(s)** ● **Objective(s)** ● **Process(es)** ● **Reference(s)** ● **Requirement(s)** ● **Risk(s)** ● **Standard(s)** *Note: After you select a value in this field, the Add <Item name(s)> link appears.*

Field/List Name	Description
Add <Item> link *Note: The link name varies based on the value selected in the Add Item field. For example, if you select the value* **Controls(s)**, *this link appears as* **Add Control(s)**, *wherein you can add one or more related Controls.*	Click the **Add <Item>** link to add the related items. The related report appears, wherein you can select the required items. The report filters are also available, which enables you to narrow down your search. *For more information on the grid functionality, refer to the Relationships Tab > Tabular Format Functionality section.*
Comments	To enter comments, perform the following steps: 1. Click in the **Comments** column corresponding to the item type. The comments text box appears, wherein you can enter your comments. 2. To save the comments, click outside the comments text box. The entered comments are displayed in the **Comments** column. *Note: However, the display of columns is configurable.* *For more information on how to configure the display of columns, refer to the Relationships Tab > Tabular Format Functionality section.*

Link Alerts to GRCF Objects > Comments Section

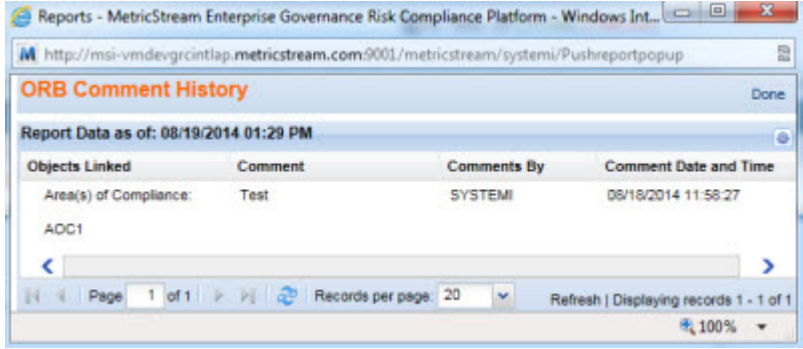Use the comments section to enter comments regarding the linking.

Figure 30: Link Alerts to GRCF Objects > Comments Section

Field/List Name	Description
Comments	Type comments regarding the relation of the alert with the GRC library content. To type details in the RTF window, do the following: 1. Click the RTF icon . The RTF window appears. 2. Type the required details. 3. Save and close the RTF window. The details that you typed in the RTF window appear in this field. *For more information on RTF functions, refer to the MetricStream Portal User Guide Release 6.1 SP4*
Object Link History link	To view the history of the contents that are linked, click this link. The following **Object Link History** window appears. This window displays the comments entered by all the users regarding the linking of GRC Foundation library content in a chronological order. Following are the columns and the respective details displayed in the **ORB Comments History** window: ● **Objects Linked**: GRC library content that are linked to an alert in a separate row. ● **Comment**: Comments entered regarding the linking. ● **Comments By**: Name of the user who entered the comment. ● **Comments Date and Time**: Date and time on which the comments entered by the user. Click the **Done** button to close the report.

Form Submission

To submit the current form, click the Submit icon.

For more information on the Form Tool Bar icons, refer to the Form Tool Bar *section.*

Note: *After you submit the form, the Attach icon of the linked alert in the* **Alert Summary Report** *changes to Yellow Attach icon . The Yellow icon indicates that the alert is linked to the GRC Foundation content.*

Task Assignments and E-mail Notifications

After you submit the current form, no task assignments and e-mails are generated.

Reports

This chapter provides information on the reports that are available in the **GRC Intelligence** application.

To use the Reports section effectively, familiarize yourself with MetricStream Portal User Guide Release 6.1 SP4.

Sections of this chapter:

1.   What is a Report?

2.   Report Filters

3.   Report Drill-Downs

4.   GRCI Application Reports

5.   Infoport Reports

What is a Report?

A report is a tabular representation of meaningful data, which you can use to make informed decisions. A report is normally made up of one or more columns. Some reports provide -down reports.

For more information on the drill-downs, refer to the Report Drill-Downs section.

Report Filters

Use the report filters to narrow down your search. The search parameters perform the function of filters to refine the output of reports. You can access report filters by clicking the Filter button on the upper-right corner of the report page. Alternatively, you can access report filters by clicking the downward-pointing arrow as shown in the below figure.

After you click the arrow or **Filters** button, the related filter window appears. Enter the search criteria, as required. Click the **Submit** button. Based on the criteria that you enter, the report data is displayed. To clear the contents in all filter fields click the **Clear All** button. To hide the filters, click the **Hide Filters** button or upward-pointing arrow at the bottom of the filter fields' window.

The following two types of parameters are available in the filter forms:

- Mandatory filter parameters: You must provide values in the parameter field.
- Optional filter parameters: You can provide values in the parameter fields or leave them blank.

Note: *You can enter search criteria in all filter fields or in just a few fields, as required. The application applies an "AND" condition to all the filter criteria that you enter.*

Note: *You can also click the **Submit** button without entering any filter criteria in any of the filter fields, provided there are no mandatory filter fields. This type of search returns one or more existing contents in the application.*

Note: *If the report filters consist of any mandatory filter parameters, the filter window appears first. Else, the report appears first and the filter window is collapsed within the report.*

Report Drill-Downs

A few reports can have associated drill-down reports. To access drill-down reports, click a column link in the parent report. A child report appears.

Note: *It is advisable to access parent reports, which provide access to drill-down reports, from the Reports infoport of an infocenter as parent reports may require key field values (parameter entries).*

To access drill-down reports, click the text that is clickable in the relevant column. Not all reports have a drill-down report.

GRCI Application Reports

The following table lists all the reports available in the **GRC Intelligence** application. The common questions regarding the usage of the report and a link to the respective report as an answer to the question is captured in the below table.

Sl. No.	To Answer this Question...	Use this Report...
1.	How do I view the details of all the subscriptions that I have opted from different channels?	Subscription Details Report
2.	How can I get the detailed information number of issues that I have raised for subscriptions?	Issue Overview Report
3.	Where is the information on issues raised for various alerts?	Issue List Report
4.	Where the information on alerts that I have subscribed to?	Alert Summary Report
5.	How do I view the list of existing channels in the application?	Manage Channels Report
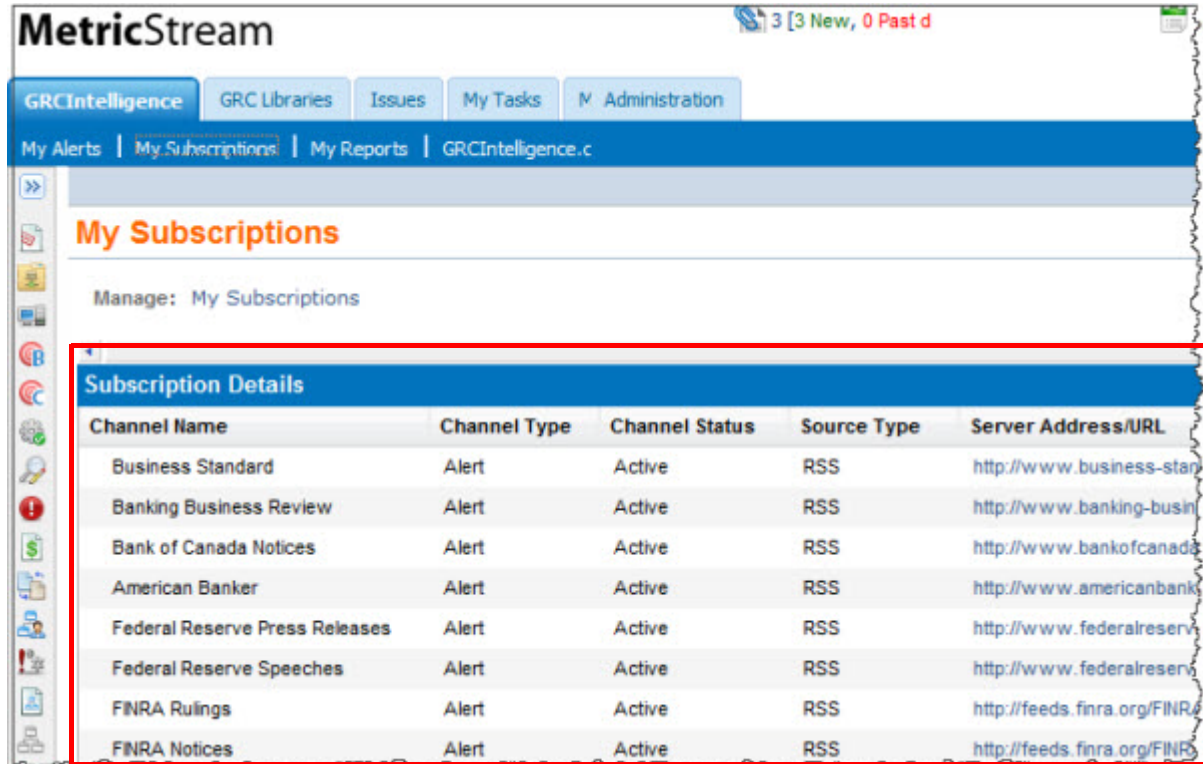
Infoport Reports

Infoport reports are those reports, which are directly displayed in the infoports.

Accessing Infoport Reports

- To access Infoport reports, click the specific infocenter within which the infoport report is available.

For example, to access the **Manage Channels** report, click the **GRC Intelligence** infocenter >> **Setup Channels** sub-infocenter.

Infoport Report

Infocenter-Infoport Report Mapping

Refer to the following table to know about the Infoport reports and the corresponding infocenter names.

Infoport Report Name	Infocenter Name
Alert Summary Report	My Alerts
Manage Channels Report	Setup Channels
My Subscriptions Report	My Subscriptions
Issue Overview Report	My Reports

Alert Summary Report

Use the **Alert Summary Report** to view the updates from the subscribed channels.

Using this report, you can:

● Log an issue for a particular alert.

For more information, refer to the Logging Issues procedure.

● Notify the internal and external users about a particular alert.

For more information, refer to the Notifying Users procedure.

Note: *When you access this report next time, you can view all the alerts which you marked as reviewed or follow-up.*

Figure 31: Alert Summary Report

Column Name	Displays the...

To expand a row, and view additional details, click the Expand icon ▷ next to the row that you want to expand.

Note: *To hide the additional details, click the Collapse icon ◢.*

Column Name	Displays the...
Mark as Reviewed	Check box. This check box is used to specify whether the alert has been already reviewed by the user or not. ● If you select the check box, the alert is marked as reviewed. ● If you clear the check box, the alert is marked as not reviewed. **Note:** *By default, the check box is cleared.*
Mark for Followup	Check box. This is used to specify the alerts that need follow up from the user or not. ● If you select the check box, the alert is marked for follow up. ● If you clear the check box, the alert is not marked for follow up. **Note:** *By default, the check box is cleared.*
Received On	Date on which the alert was received.
Channel Name	Name of the parent channel of the alert.
Alert Title	Title of the alert.
Details	Details icon 📋. Drill-down: ● Alert content details window
Actions	Gear icon clicking on which a small pop window displaying **Notify User(s)**, **Log Issue** and **Link to..** links. Drill-down to **Notify User(s)** link: ● **Notify Users** form Drill-down to **Log Issue** link: ● **Log Issues** form Drill-down to **Link to..** link: ● **Link Alert to GRCF Objects** form

Alert Summary Report Filters

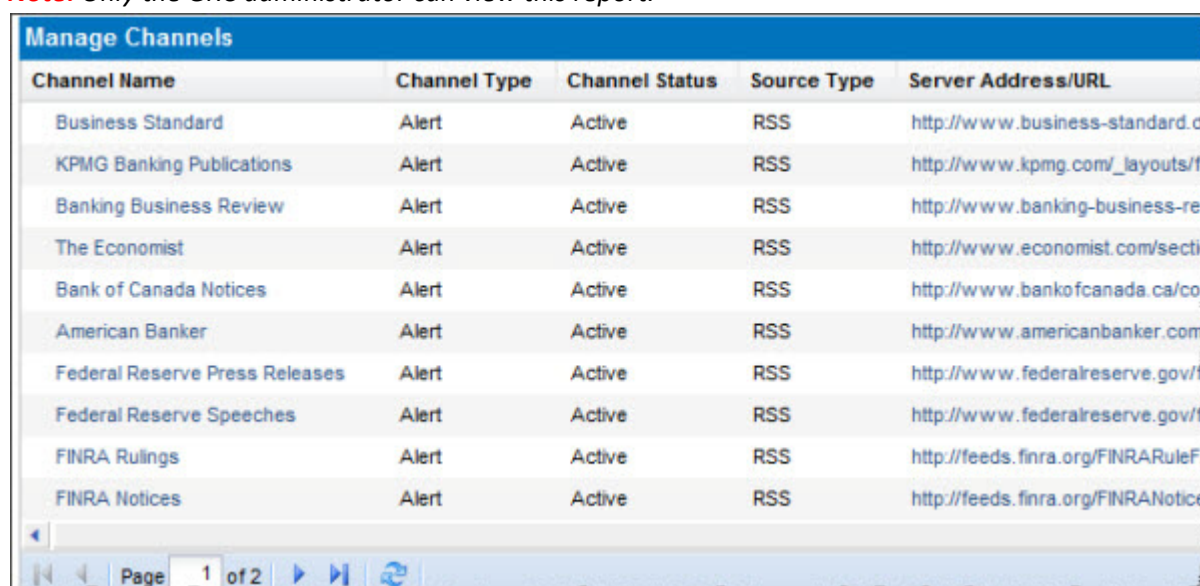To retrieve specific records in the related report, use these filter parameters.

Figure 32: Alert Summary Report > Filters

Filter	Use This Filter to...
Based on the filter inputs that you provide, the report retrieves relevant records.	
Channel Name	Select the name of the channel.
Alert Title	Provide the title of the alert.
Alert Received To Date	Enter a date. The application displays all the alerts that are received till the entered date.
Alert Received From Date	Enter a date. The application displays all the alerts that are received from the entered date.
Follow-Up Status	Select the follow status of the alert. The following options are available: ● **Marked for follow up** - If you want to search for alerts which are marked for follow-up, select this option. ● **Not Marked for follow up** - If you want to search for alerts which are not marked for follow-up, select this option.
Alert Reviewed Status	Select the review status of the alert. The following options are available: ● **Marked as Reviewed** - If you want to search for alerts which are marked as reviewed, select this option. ● **Not Marked as Reviewed** -If you want to search for alerts which are not marked as reviewed, select this option.
Link Created Date	Enter a date. The application displays all the alerts that are linked on or before the entered date.
Link Created By	Type the user who created the link.
Link Status	Select the status of the GRC foundation content linking. The following options are available: ● **Linked**: If you want to view the linked alerts, select this option. ● **Unlinked**: If you want to view the alerts that are not linked, select this option.

Manage Channels Report

Use the **Manage Channels** report to view all the existing channel information.

Note: Only the GRC administrator can view this report.

Figure 33: Manage Channels Report

Column Name	Displays the...
Channel Name	Name of the channel.
Channel Type	Type of the channel.
Channel Status	Status of the channel.
Source Type	Type of the source. It can be either **Email** or **RSS**.
Server Address/URL	Address or URL of the server.
User Name	Name of the user.
Email From	Name of the person who has sent the email.
Keywords	Keywords used for the search.

Subscription Details Report

Use the **Subscription Details** report to view the details of all the subscriptions from different channels.
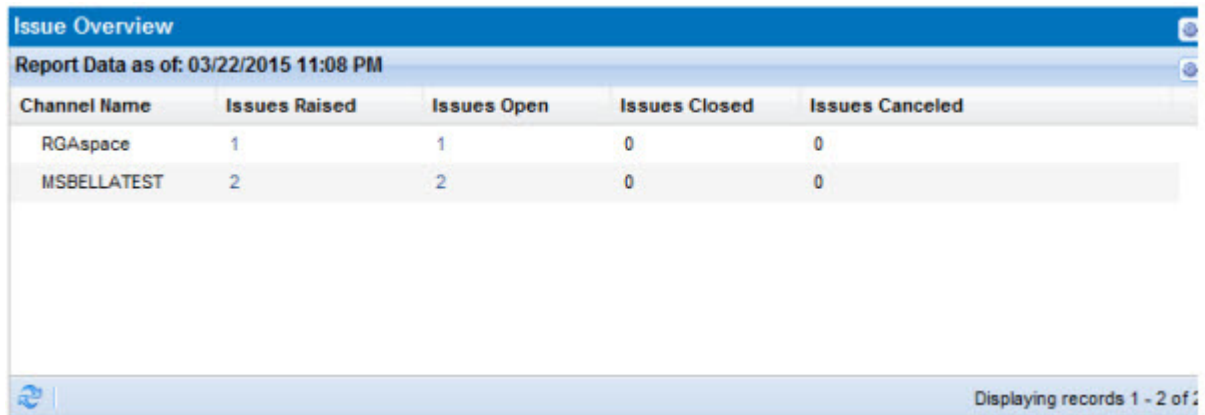

Figure 34: Subscription Details Report

Column Name	Displays the...
Channel Name	Name of the channel.
Channel Type	Type of the channel.
Channel Status	Status of the channel.
Source Type	Type of the source.
Server Address/URL	Address of the server. Drill Down: ● GRC Intelligence.com website
Keywords	Keywords (comma separated) values based on which the alert is filtered.
Notify by Email	Value **Yes** or **No**. ● **Yes** - Indicates that notification needs to be done by email ● **No** - Indicates that notification is not needed by email
Status	Status of subscription.

Issue Overview Report

Use the **Issue Overview** report to view the list of all channels that you have subscribed. It also displays the issue details raised for the subscriptions.

Figure 35: Issue Overview Report
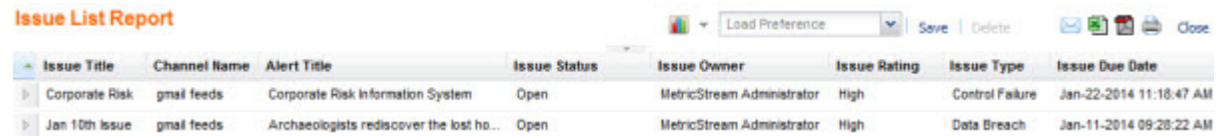
Column Name	Displays the...
Channel Name	Name of the channel.
Issues Raised	Count of issues raised by the user for the specific channel. Drill-Down: ● Issue List Report
Issues Open	Count of issues that are open from the list of issues raised for the specific channel. Drill-Down: ● Issue List Report
Issues Closed	Count of issues that are closed for the specific channel. Drill-Down: ● Issue List Report
Issues Cancelled	Count of issues that are cancelled for the specific channel. Drill-Down: ● Issue List Report

Issue List Report

Use the **Issue List Report to** view the list of issues raised by the user for specific alert from the channels.

This report is a drilled-down of the **Subscription Overview** report. For example, in the **Subscription Overview** report, if you click the **Issues Raised** in the **Issue Raised column** corresponding to the channel name, all the issues related to the channel are displayed in this report.
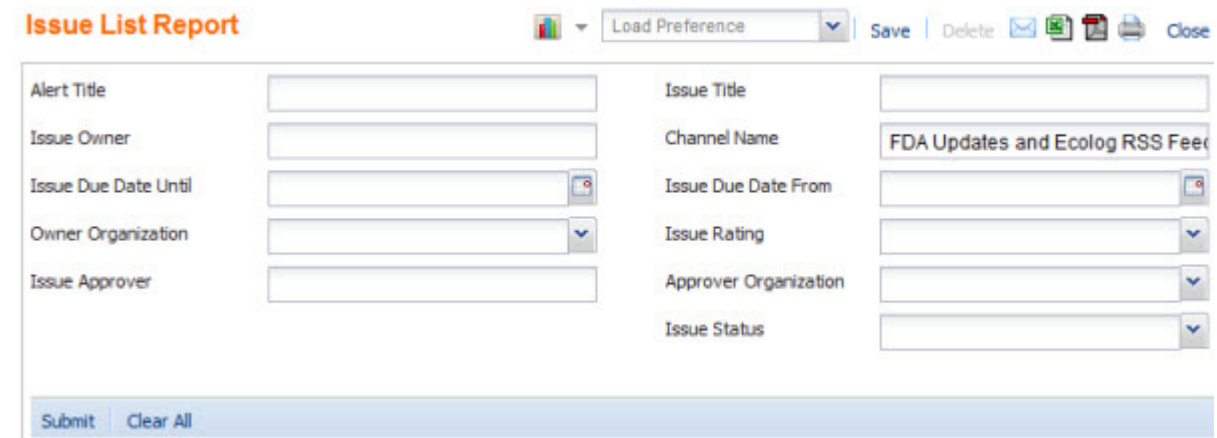

Figure 36: Issue List Report

Column Name	Displays the...
To expand a row, and view additional details, click the Expand icon ▷ next to the row that you want to expand. **Note:** *To hide the additional details, click the Collapse icon ◢ .*	
Issue Title	Title of the issue.
Channel Name	Name of the Channel of the alert for which issue was raised
Alert Title	Alert title as it appeared for which issue was raised
Issue Status	Current status of the issue.
Issue Owner	Name of the issue owner.
Issue Rating	Rating of the issue.
Issue Type	Priority of the issue.
Issue Due Date	Date by when the issue needs to be addressed.

Issue List Report Filters

To retrieve specific records in the related report, use these filter parameters.

Figure 37: Issue List Report Filters

Filter	Use This Filter to...
The report details are narrowed down based on the values that you select in the filter fields.	
Alert Title	Type the title of the alert.
Issue Owner	Type the name of the issue owner.
Issue Due Date Until	Enter the date. For example, if the user enters date in this field as January 31, 2014 in this field, the application displays all the issues that need to be resolved till January 31, 2014.
Owner Organization	Select the owner organization.
Issue Approver	Type the name of the issue approver.
Issue Title	Type the title of the issue.
Channel Name	Type the name of the channel. By default, a channel name appears. If you do not want the default channel name, you can delete that and type the channel name as per your choice.
Issue Due Date From	Enter the date. For example, if the user enters date in this field as January 24, 2014, the application displays all the issues that need to be resolved from January 24, 2014.
Issue Rating	Select the rating for the issue.
Approver Organization	Select the approver organization.
Issue Status	Select the status of the issue.

Glossary

Alerts

Alerts are e-mail updates that are sent to pre-defined users triggered by certain events such as New content ingested, content process failure, and so on.

API

Application programming interface

GRC

Governance, Risk, and Compliance

Infocenter

One common and user specific page that appears to users once they login to the MetricStream application. The individual items in the infocenter, such as user forms, assignments, and reports appear on this page

Infoport

All related user objects, which are grouped in a single section of the infocenter, that facilitate work

Reports

A tabular representation of data

RSS

Really Simple Syndication) is a family of web feed formats used to publish frequently updated works—such as blog entries, news headlines, audio, and video—in a standardized format. An RSS document (which is called a "feed", "web feed", or "channel") includes full or summarized text, plus metadata such as publishing dates and authorship.

XML

Extensible mark up language

Index

R

S

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