

Release-News 22/R2

ibi systems iris



ibi systems GmbH Rudolf-Vogt-Straße 6 93053 Regensburg www.ibi-systems.de

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1 Important Notes

1.1 Clearing the browser cache to display the new menu design

Since the new release brings with it a new menu design (see chapter 2.1), every user should **empty** his **browser cache** when calling up the new release for the first time, since the design code typically cached by the browser has changed due to the new main menu. One possibility is, for example, to refresh the iris website in the browser via "Ctrl" + "F5".

1.2 Implementation of new standard notification rules

In addition to the new menu design, eleven new standard rules for time-related user notifications are delivered with version 22/R2 (see chapter 2.2). These are automatically activated after the update to the new version. In the administration of the user notifications, the new rules can be identified using the filter "User action is equal date" and then be deactivated if necessary (set "Lifecycle" to "Inactive"). In addition, the individual email hints can be added to the new notification rules.

1.3 New user role permissions for excel import of persons

In the list view of the person register, it is now possible to import (multiple) persons or companies via Excel (see chapter 3.5). A prerequisite for the availability of the import functionality is that the user role of the user contains the corresponding permission. This is not automatically assigned to the existing user roles when the release is delivered, i.e. it is deactivated by default for all user groups. To activate the permission, the respective user role must be assigned the corresponding entry (activate checkbox):

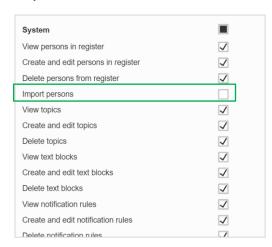


Figure 1 Permission for the import of persons

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2 Highlights

2.1 New menu design

For a more appealing and compact user interface, the design of the navigation menu has been modernized. There is now no longer a separate blue status bar and menu bar below it, but only one integrated blue menu bar in which the various functions are located with the corresponding icons.



Figure 2 New menu design

In addition, short descriptions of the various sub-entries have been added to the drop-down menu, which opens via mouse-over effect. This makes it easier for every (new) iris user to see which functions and use cases are hidden behind a sub-entry.

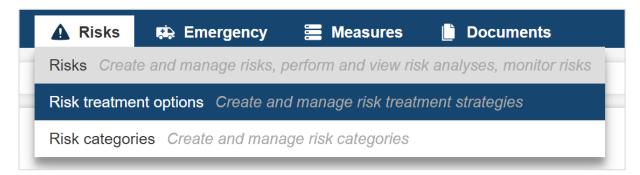


Figure 3 Mouse-over effect - Display of the sub-entries with short descriptions

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2.2 Time-related configurable user notifications

As a further innovation, time-related notification rules can now be defined. These supplement the existing event-controlled notification rules that are triggered when changes are made to a dataset, or a new dataset is created. With the help of the time-related notification rules, it is now also possible that X days/weeks/months/years before or after a date or on an exact date, notifications are sent to the responsible user(s). Regarding the date condition, all date fields that are available in ibi systems iris can be selected (incl. custom fields of type date).

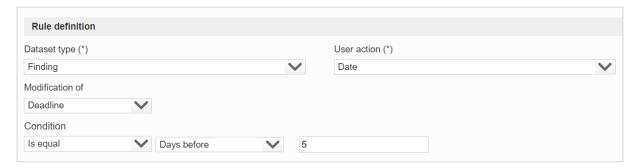


Figure 4 Time-related notification rule using the example of findings

There are eleven predefined standard rules which are delivered with the new release (see Table 1). As with the event-driven notification rules, an individual email hint can be defined for the new type of notification rules and the rules can be activated or deactivated via the lifecycle attribute.

Reguest	A request in my responsibility has not	The user is informed if a request in his responsibility is still unprocessed
,	been processed within the first 7 days	7 days after submitting the request.
	since the request was submitted	, ,
	·	
Finding	Deadline for a finding relevant to me	The user is informed when the deadline for a finding is due in 7 days
	is approaching in 7 days	and the finding is in his responsibility or he is responsible for a measure
		linked to the finding.
Assessment	Assessment can be closed now	The user is informed when he is registered for an assessment for the
l		assessment closing and the closing period starts.
Assessment	Assessment needs to be closed within	The user is informed if he is registered for an assessment for the
	the next 7 days	assessment closing, the assessment is not closed yet and the closing
	_	period ends in 7 days.
Document	Validity of a document in my	The user is informed when the validity of a document in his
	responsibility is expiring in 30 days	responsibility expires in 30 days.
Measure	Deadline for a measure relevant to me	The user is informed when the deadline for a measure is due in 7 days
	is approaching in 7 days	and he is responsible for the measure or he has been entrusted with
		the implementation of the measure.
Emergency Event	Emergency event in my responsibility	The user is informed if he is responsible for an emergency event or a
	occurred 14 days ago and has not	related measure not closed yet and the emergency event has not been
	been closed yet	closed yet, it was not a drill and the emergency event occurred 14 days
		ago.
Assessment block	Assessment needs to be finished	The user is informed if he is entered as an assessor for an assessment
	within the next 7 days	that has not been closed yet and the assessment period for an
	,	assessment block assigned to him ends in 7 days.

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Assessment block	Assessment can be assessed now	The user is informed when he is entered as an assessor for an
		assessment and the assessment period for an assessment block
		assigned to him begins.
Incident	Incident in my responsibility occurred	The user will be informed after 14 days if he is responsible for an
	14 days ago and has not been closed	incident, a related measure not implemented yet or a related finding
	yet	not closed yet and the incident has not been closed yet.
Compendium	Validity of a compendium in my	The user is informed when the validity of a compendium in his
	responsibility is expiring in 30 days	responsibility expires in 30 days.

Table 1 Predefined time-related standard notification rules

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2.3 Implementation of a professional responsibility

To create a distinction between the responsibility for the dataset in ibi systems iris and the professional responsibility in the real world, a new field for the professional responsibility was added to the master data for all relevant entity types. The professional responsibility can be assigned either to a user or to an entry from the person register. The new attribute is purely informative and, in contrast to the responsibility of the dataset, has no influence on the access permission for the dataset. The caption of the professional responsibility was adjusted for the different entity types. For example, the professional responsibility of a risk is called "Risk Owner". The corresponding attribute can also be added as a column in the list view and used in the dataset filters.

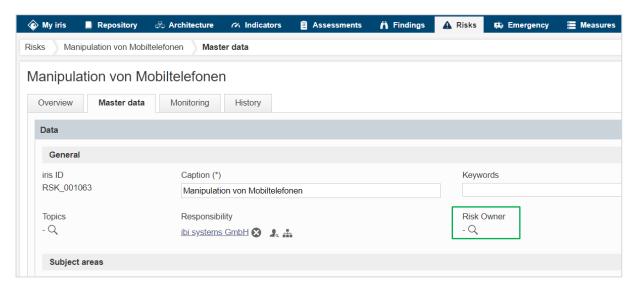


Figure 5 New field for the professional responsibility using the example of risks

The attribute for the professional responsibility is available in the master data of the following dataset types:

- 1. Compendia
- 2. Requests
- 3. Assets
- 4. Processes
- 5. Indicators
- 6. Assessments
- 7. Findings
- 8. Incidents
- 9. Risks
- 10. Emergency scenarios
- 11. Emergency events
- 12. Measures
- 13. Documents

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2.4 Extension of the assessment automations

The assessment automations have been improved by two new features. These are, on the one hand, the implementation of measure recommendations for the individual controls and, on the other hand, the mass deduction of measure recommendations of an assessment.

The validity of the assessment automations of type measure recommendation can be defined not only for a whole assessment but also for individual / several controls.

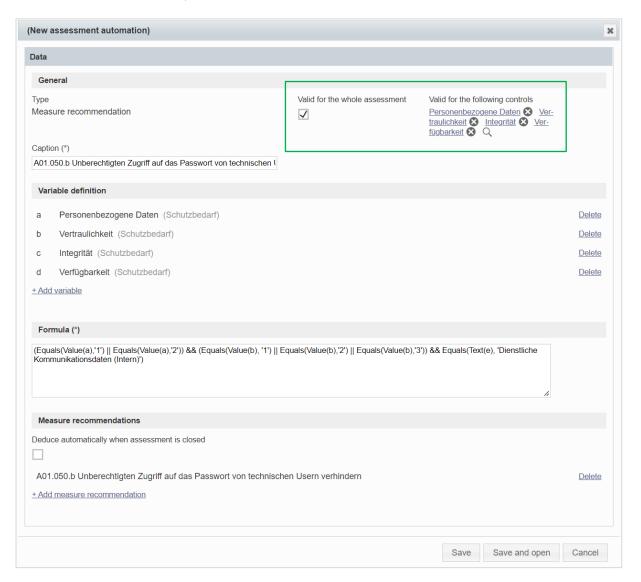


Figure 6 Measure recommendations for controls and whole assessment

By assigning the validity of the measure recommendations to individual controls, the measures can now also be deduced from the controls and not only across the board for the whole assessment. Each control can contain different measure recommendations depending on the definition of the automations.

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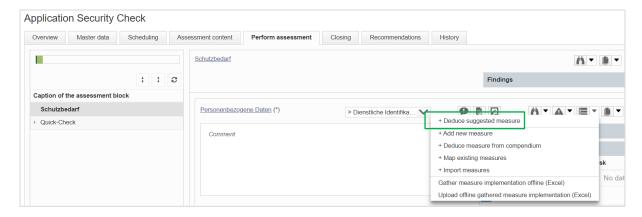


Figure 7 Deduction of suggested measures for a control

In the "Recommendations" tab, you can find both the overall measure recommendations of the assessment and the measure recommendations of the individual controls. At the deduction in this list view, measure recommendations that are attached to a control are linked to the respective control. For better clarity, there is a new column "Origin", which shows where a measure recommendation originates from.

Furthermore, several measures can now be selected at once from the measure recommendations of an assessment via multi-select and be deduced via the button "Multi-Edit".



Figure 8 Mass deduction of measure recommendations

During the (mass) deduction of the measures, a pop-up window opens for entering the attributes for the master data of the selected measures. For example, the same affected process can be stored for all selected measures. However, the caption and description of the measures cannot be defined across the board, as these are taken from the template (=compendium chapter) of the respective measure. After the (mass) deduction of the measures, the deduced measures can be seen on the overview page of the assessment at the corresponding widget.

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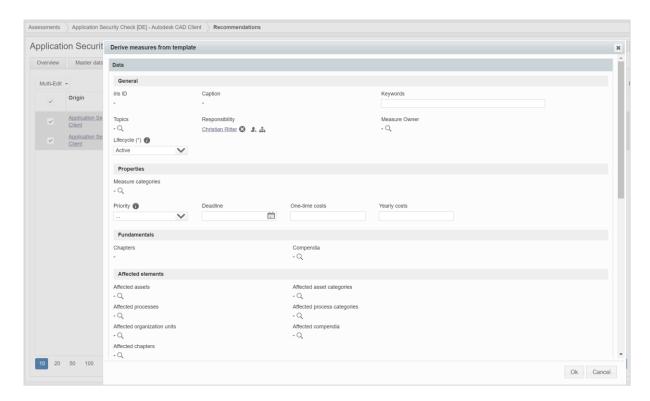


Figure 9 Pop-up window for entering master data when deriving measures

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2.5 Extension of assets with BIA functionality

The "BIA" tab, which was previously only found for the processes, has now also been integrated for the assets with the same functionality. In the standard configuration, the inheritance of the information in the BIA for the business impact (actual) is analogous to the inheritance direction of the protection requirement. So, the actual business impact can be inherited both from downstream assets and from linked processes, depending on which of the values is the lowest (minimum principle).

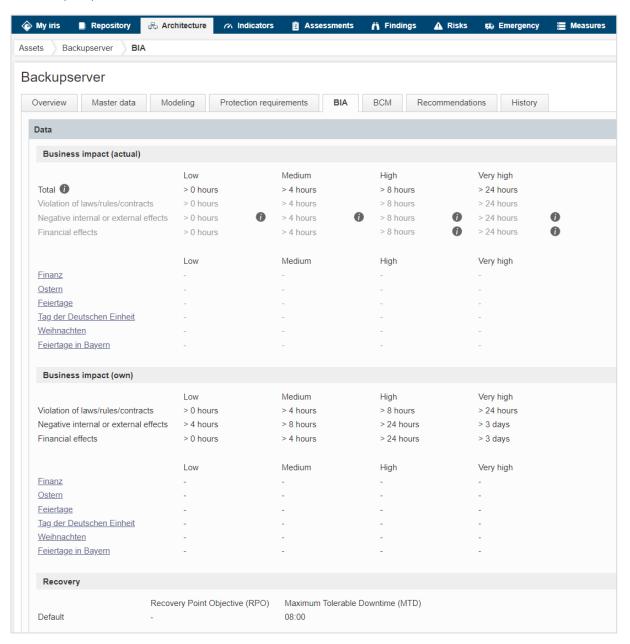
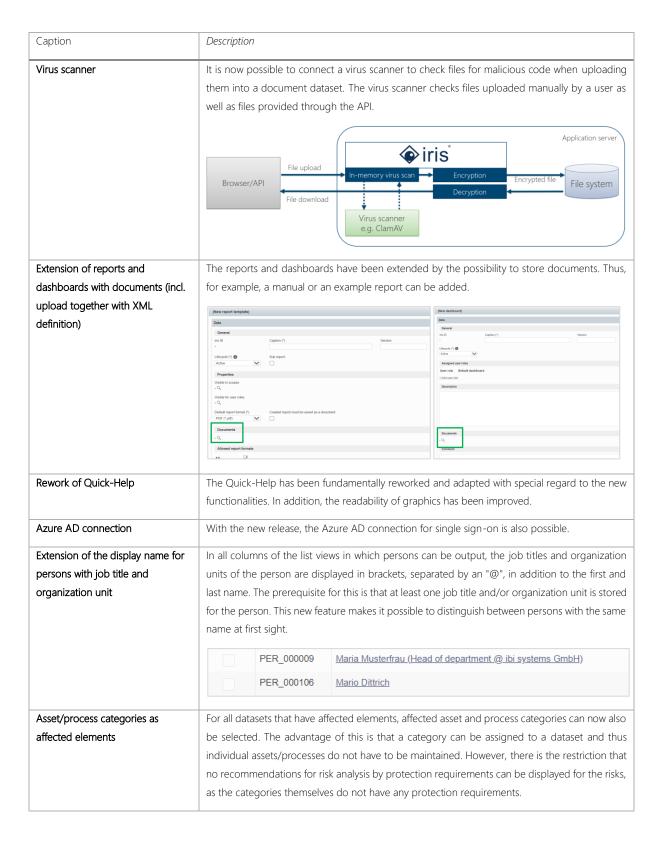


Figure 10 BIA functionality for assets

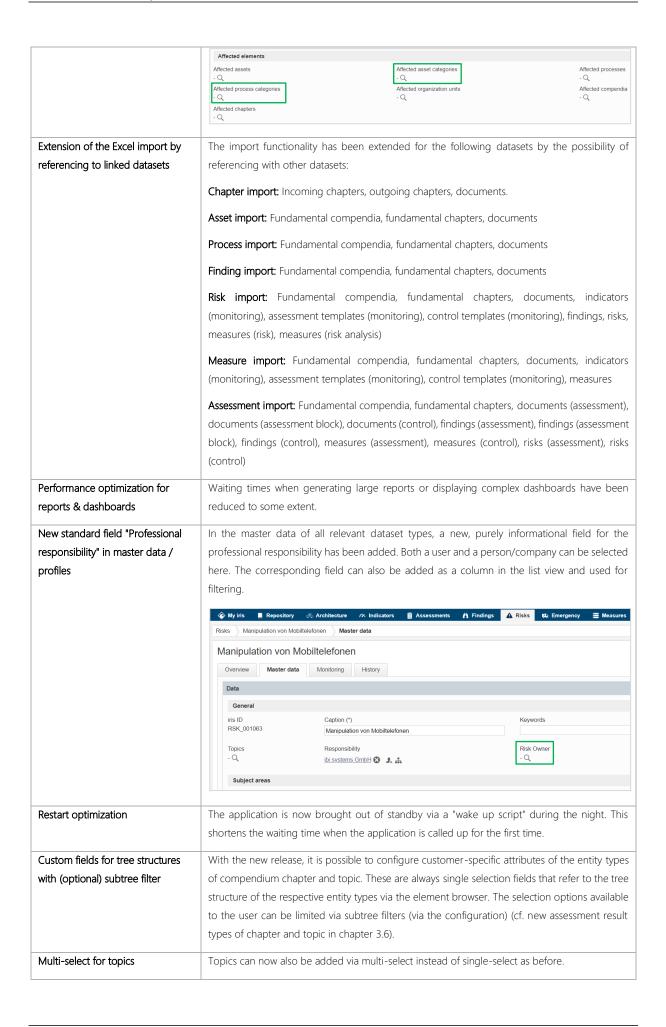
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3 Overview of all new functions and improvements

3.1 Comprehensive aspects and usability



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Modernization menu design	The new menu design is more compact than the previous one and includes icons and short descriptions of the menu items (see chapter 2.1)
Update DevExpress to version 22.1	For DevExpress, the update to the latest version 22.1 was performed.

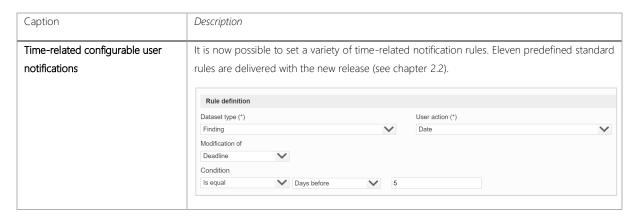
3.2 API extension

Caption	Description	
API extension: Documents	It is now possible to access "Documents" via API. The available API requests are listed	l below:
	Create a new document of the reference type	
	2. Create a new document of the URL type	
	3. Create a new document of the file type	
	4. Add file to a document of type file	
	Document v1 POST /api/Documents/v1/References Citable a new reference.	<u> </u>
	POST /api/Documents/v1/Ur1 Creste a new url.	â
	POST /api/Documents/v1/Upload Create new meta data for a file.	â
	POST /api/Documents/v1/Upload/(uploadId)/File Create a new file.	â
API extension: Assessments	The API for the assessments has been adjusted since the last release and extended	d with the
	possibility of editing and reading out control results:	
	1. Create a new assessment	
	2. Create a new external assessment	
	3. Add existing assessment template to assessment	
	4. Add existing assessment block template to the assessment	
	5. Add assessor to assessment	
	6. Add assessor to assessment block	
	7. Add reviewer to assessment	
	8. Add reviewer to assessment block	
	9. Add assessment closing	
	10. Update control result	
	11. Retrieve control result	
	Assessment v1	~
	PUT /api/Assessments/v1/Blocks/{externalId}/Assessors Update the details for the assessor for an assessment block.	â
	PUT /api/Assessments/v1/8locks/{externalId}/Reviewers Update the details for the reviewer for an assessment block.	â
	PUT /api/Assessments/v1/(assessmentExternalId)/Blocks/(assessmentBlockTemplateExternalId)/Points Update the deals for assessmentPointTemplateExternalId)/Result	the result for an
	dET /api/Assessments/v1/{assessmentExternalId}/Blocks/{assessmentBlockTemplateExternalId}/Points Retrieve the details for point result.	r an assessment
	POST /api/Assessments/v1/Externals Create a new external assessment.	â
	POST /api/Assessments/v1/Forms Croate a new form assessment.	â
	PUT /api/Assessments/v1/Forms/{externalId}/Import/Templates/Form Update the details for an form assessment with a template.	â
	PUT /api/Assessments/v1/Forms/{externalId}/Import/Templates/Block Update the details for an assessment block with a template.	â
	PUT /api/Assessments/v1/Forms/{externalId}/Assessors Update the details for an assessor for an form assessment. PUT /api/Assessments/v1/Forms/{externalId}/Reviewers Update the details for a reviewer for a form assessment.	<u> </u>
	PUT /api/Assessments/v1/Forms/(externalld)/Closers Update the details for a closer for a form assessment.	â
API extension: Person register	It is now possible to access the person register via API. The available API requests	are listed
	below:	
	1. Retrieve details of an entry from the person register	
	2. Search for a dataset in the person register	
	3. Create a new entry in the person register	

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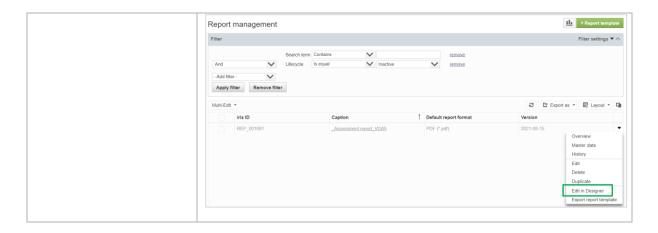
3.3 Notification rules



3.4 Report management

Caption	Description
"Edit in Designer" in the action	In report management, reports can be edited directly in Designer via the action menu in the list
menu	view.
menu	view.

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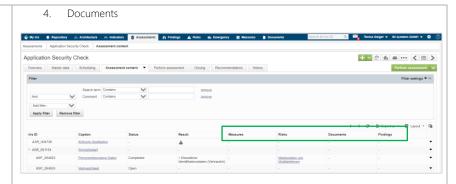
3.5 Person register

Caption	Description
Excel mass import for person	In the list view of the person register, it is now possible to import (multiple) persons or companies
register	via Excel. The prerequisite for this is that the user role of the user is assigned the appropriate
	permission (see chapter 1.3). **Party File Repository Activation Assessment Product A fields G (Emergancy Manuals Manua

3.6 Assessments

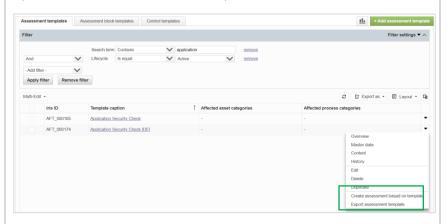
Caption	Description
Mass deduction of measure	In the list of the measure recommendations for an assessment, several measures can be selected
recommendations	via multi-select and deduced via "Multi-Edit".
	Assessment Application Security Check [DE] - Autodes CAD Crient Recommendations Application Security Check [DE] - Autodesk CAD Crient Experiment Exper
	Oracine Maint das Consulta Annexes Contra Pertura assessment Contra Recommendations History MAN-EST - Distance assessment in Annexes 1 Consequence 1 Cons
	Assistant Seath Ches CGL-Arbeits CAD Clear Assistant Seath Ches CAD Clear Assistant Seath Ches CAD Clear Assistant Seath Ches CAD Clear Assistant
	During the (mass) deduction of the measures, a pop-up window opens for entering the attributes in the master data of the selected measures. For example, the same affected process can be stored for all selected measures. However, the captions and descriptions of the measures cannot be defined across the board, as these are taken from the template (=compendium chapter) of the respective measure. After the (mass) deduction of the measures, the deduced measures can be seen on the overview page of the assessment at the corresponding widget.
Removal of fields from control	In the control templates, the unnecessary input options for the "Default value" and the "Target
templates	value" have been removed for the result types "User", "Person" and "Organization unit".
Extension of the assessment	The following columns and filters which can be stored by the assessors for the individual controls
content with mappings	have been added to the assessment content:
	1. Findings
	2. Risks
	3. Measures

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Extension of the action menu for assessment templates

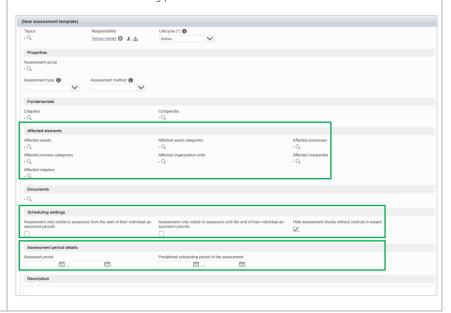
For assessment templates, there is now the option in the list view in the action menu to directly export an assessment and deduce it from a template.



Extension of attributes for transfer from assessment templates

The following attributes can now also be stored in the master data of an assessment template so that they can be transferred when an assessment is deduced from an assessment template.

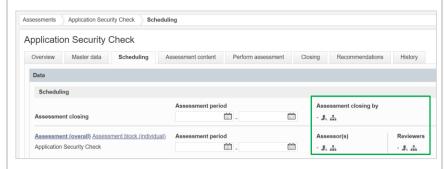
- 1. Affected Elements
- 2. Assessment only visible to assessors from the start of their individual assessment periods
- 3. Assessment only visible to assessors until the end of their individual assessment periods
- 4. Hide assessment blocks without controls in wizard
- 5. Assessed period
- 6. Predefined scheduling period of the assessment



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Deposit of an organization unit for the assessor, reviewer, and assessment closer In the "Planning" tab of an assessment, an organization unit can now be stored for the following fields in addition to a user:

- 1. Assessor
- 2. Reviewer
- 3. Assessment closing by



Any user belonging to this organization unit can perform the assessment activity. This creates the possibility to use centralized assessment teams.

Assessment automation with measure recommendations for controls

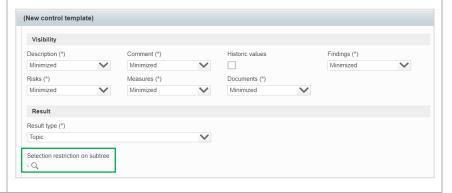
The validity of the assessment automations of the type measure recommendation can now be defined for individual / several controls in addition to the whole assessment.



By assigning the validity of the measure recommendations to individual controls, the measures can now also be deduced from the controls and not just across the board for the whole assessment (see chapter 2.4). Each control can contain different suggested measures depending on the definition of the assessments. The "Recommendations" tab contains both the overall measure recommendations for the assessment and the measure recommendations for the individual controls. In this list view, measure recommendations that are attached to a control are linked to the respective control. For better clarity, there is a new column "Origin", which shows where a measure recommendation originates from.

New assessment result type "Topic" with filter on a subtree

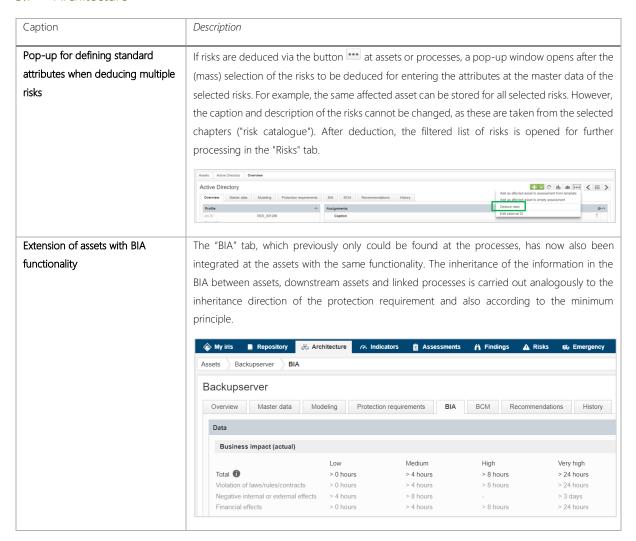
A new assessment result type "Topic" has been introduced for control templates or controls. When defining the result type, a selection restriction to a subtree of all topics can be specified.



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A new assessment result type "Chapter" has been introduced for control templates or controls. New assessment result type "Chapter" with filter on a subtree When defining the result type, a selection restriction to a subtree of all compendium chapters can be specified. (New control template) Visibility Description (*) Comment (*) Historic values Findings (*) Minimized Minimized Minimized Risks (*) Measures (*) Documents (*) Minimized Minimized Minimized Result Result type (*) - Q

3.7 Architecture



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