BarnOwl V11

FULLY INTEGRATED RISK MANAGEMENT, COMPLIANCE AND AUDIT SOFTWARE

BarnOwl V11 spotlight
25 May 2023
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Online via Teams, RSVP to cheryl@barnowl.co.za to receive the link

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BarnOwl V11 - Agenda

- BarnOwl V11 introduction

- Why upgrade to BarnOwl version 11?

- The BarnOwl version 11 roadmap

- What does BarnOwl v11.1 mean for me?

- Features of BarnOwl v11.1

- BarnOwl Power BI and SSRS reporting

- Demo of BarnOwl v11.1

- In summary, upgrading to BarnOwl v11

- How do I upgrade to BarnOwl v11.1?

- Conclusion

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BarnOwl V11 introduction

- Version 11 offers our clients a fresh, modern and simplified web-based user interface utilising the latest web-based technology

- Version 11, will over time, incorporate much of BarnOwl's extensive desktop app 'rich' functionality including built-in reporting

- Currently V11.1 (released Feb 2023) replaces the existing BarnOwl Lite interface with a new modern interface

- By early 2024, Version 11.4 will incorporate much of BarnOwl's extensive desktop app ('rich') functionality and become the default user interface for risk management, whilst the desktop app ('rich') will be used mainly by administrators.

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Why upgrade to BarnOwl V11

- Upgrade BarnOwl to the latest web-based technology

- Modern, clean-cut user interface

- Simplified navigation

- Standardised look & feel across all registers and forms (pages)

- Risk on a page simplifies risk taxonomy

- Performance enhancements

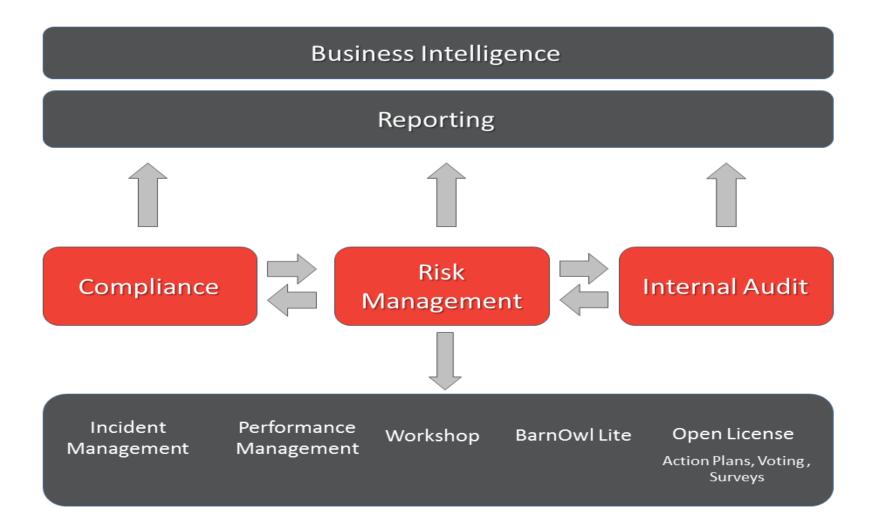- Functional improvements

- Minor bug fixes.

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BarnOwl V11 Roadmap

- V11.1 (BarnOwl Web risk management) (February 2023)

- V11.2 (BarnOwl Web voting (RCSAs, Surveys, Questionnaires)) (mid 2023)

- V11.3 (BarnOwl Web reporting) (end 2023)

- V11.4 (Internet facing Votes, Surveys & Questionnaires) (early 2024)

- Administrative tasks will remain in the desktop app

- Standard built-in reports will remain in the desktop app

- Standard Power BI and SSRS reporting off the BarnOwl native database (included at no additional cost on request)

- Advanced Power BI and SSRS reporting off the BarnOwl data warehouse (additional purchased license)

Recap - BarnOwl integrated modules

What does BarnOwl V11.1 mean for me?

- V11.1 essentially replaces the existing web-based BarnOwl Lite interface with a new modern interface utilising the latest web-based technology.

- No changes have been made to the BarnOwl Rich desktop app. BarnOwl Rich will still work exactly the same way.

- A web-based Lite license is included with every Rich license. Therefore a Rich user has the option of using the web-based interface or the desktop Rich interface or both interfaces for certain functions (e.g. reports in Rich versus simplified capture / maintenance of risks in Lite).

- The advantage of the new V11.1 web-based interface is that it is:
    - easy to navigate
    - easy to capture and maintain all risk related data (risk on a page)
    - performs well (i.e. is fast) over a slow network such as a VPN
    - V11.3 (scheduled late 2023) will include built-in reports

- Version 11.1 incorporates bug fixes / minor enhancements so it is advisable to upgrade to V11.1.

- The Rich desktop app includes:
    - built-in reporting
    - drill-down registers whereby you can expand a register (e.g. the risk register) to see detailed child registers (contributing factors, controls, KIs, action plans etc.). However this is also what makes BarnOwl Rich appear complex
    - administrative functions such as applying of processes, risk templates, votes etc.

Features of BarnOwl V11.1

- Landing page giving the user a heads up of work items (Action plans, Votes, Key Indicators, RAPs) (v10)

- New look & feel organisational structure (option in SMC to include processes)

- Registers (Clean look & feel with column filtering, field selection, sorting, drag & drop columns, grouping, favourite views, global search (across multiple fields))
  - Objective Register
  - Risk Register (focal point)
  - My Key Indicators
  - My Action plans
  - Incident registers
  - My Voting

- Register menus:
  - Actions (Link record, Unlink record)
  - This View (Clear filters, Wrap all, Unwrap all, Reset, Export to Excel, Export to PDF, Add to My BarnOwl)
  - Favourite View (New, Update, Edit, Delete, manage, Select)

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Features of BarnOwl V11.1 (continued)

- Link / Unlink:

  – Easy to search library and link an existing record to a unit or create a new library record

  – Easy to unlink a record from a unit

  – Easy to maintain library records (new, merge, delete with administrator permissions) (v10)

- On loading a form / page:

  – Logical menu options: Action (Save&Close, Save, Unlink from Unit), View (History, Model, Linked)

  – Logical tabs: Library record, Linked objects, Unit detail, Ratings, Owners, Custom fields

- Risk Structure:

  – Risk on a page with easy navigation to all associated objects (objectives, controls, contributing factors, action plans, key indicators, incidents, parent risks, child risks, votes, audit projects)

  – Context sensitive menus (including collapse all / expand all)

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Reporting #1 - Standard Power BI Dashboards (directly off the BarnOwl database)

- BarnOwl now provides <u>standard</u> Risk, Compliance and Audit Power BI dashboards at no additional cost

- The user needs to have downloaded Microsoft Power BI <u>desktop</u> (free version) in order to view the BarnOwl dashboards. In some cases, your IT department have will have Power BI server which has further advantages

- Whilst we (BarnOwl) will show you the basics of how to use the BarnOwl Power BI dashboards, BarnOwl does not provide or offer training on Power BI. (in the same way that we do not offer Excel training)

- The Client is welcome to request customisations to the standard BarnOwl Power BI dashboards on a quotation or Platinum services basis

- The Client is welcome to make their own changes to the Power BI dashboards. <u>Note</u>: Always work on a copy of the original. BarnOwl does not support client modified dashboards

- BarnOwl's standard Power BI dashboards run directly off the BarnOwl database (as opposed to the BarnOwl warehouse). With a simple 'refresh' they pull in the latest data from the BarnOwl database

- Currently, BarnOwl permissions are not built into the standard Power BI dashboards, so it is advisable for a Client administrator to filter and distribute the relevant dashboards to the intended audience.

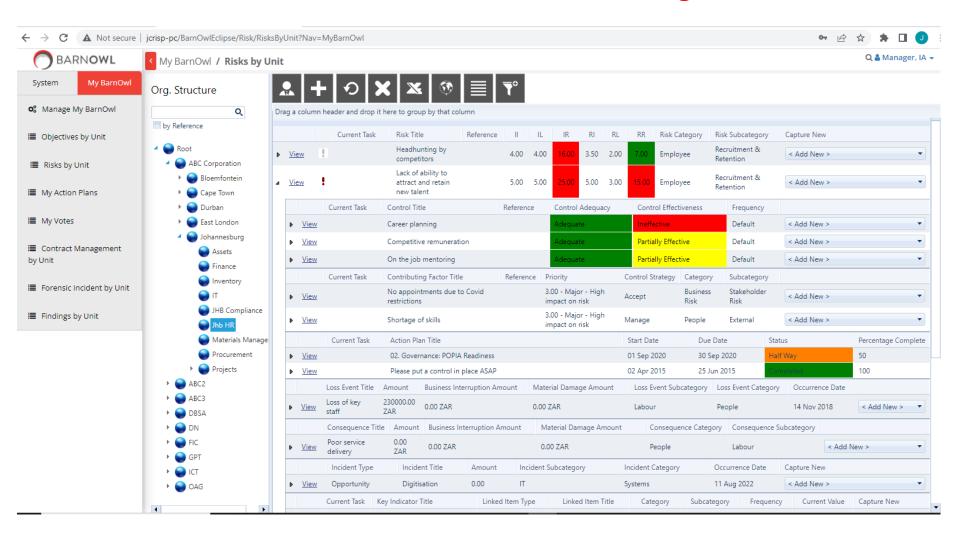# Reporting #2 - Advanced Power BI dashboards (off the BarnOwl data warehouse)

- The BarnOwl data warehouse provides more advanced Power BI dashboards. The BarnOwl data warehouse has a license cost associated with it

- It is easier for the Client (IT department normally) to create their own dashboards off the data warehouse compared with the native BarnOwl database

- The BarnOwl data warehouse is typically refreshed after hours by a batch job (service), so changes to the data are not immediately reflected in the warehouse Power BI dashboards.

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Reporting #3 - SSRS (SQL Server Reporting Services) (directly off the BarnOwl database)

- SSRS reports are tabular in nature as opposed to the graphical drill-down interactive Power BI dashboards

- BarnOwl now provides a few standard SSRS reports at no additional cost

- SSRS is included as part of Microsoft SQL server integration services at no additional cost; however integration services does require some configuration by the Client IT department

- The Client is welcome to request customisations to the standard BarnOwl SSRS reports on a quotation or Platinum services basis

- BarnOwl's SSRS reports run directly off the BarnOwl database (as opposed to the BarnOwl warehouse). They are always 'live' with no need to refresh data

- Currently, BarnOwl permissions are not built into the standard SSRS reports, so it is advisable for a Client administrator to filter and distribute the relevant SSRS reports to the intended audience.

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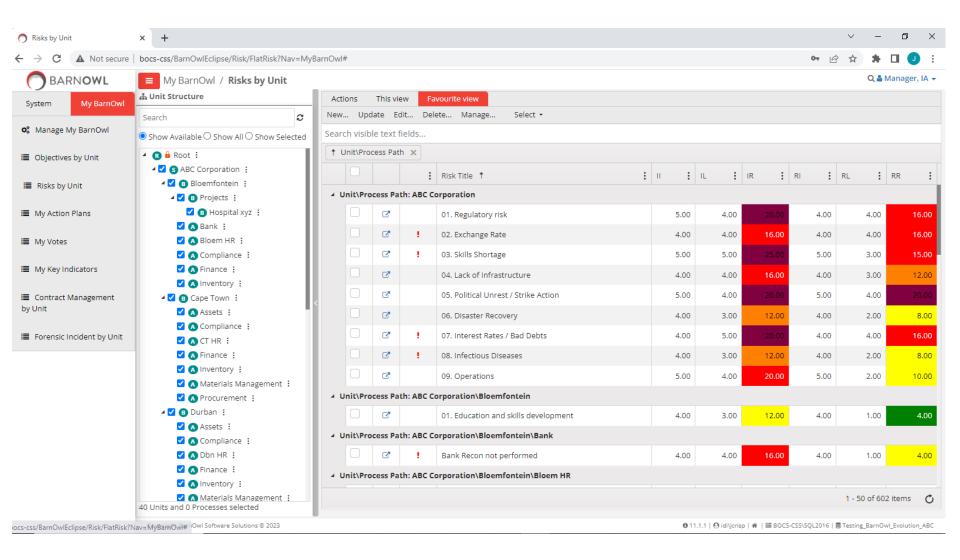
In summary, upgrading to BarnOwl V11.1

- replaces the existing BarnOwl Lite interface with BarnOwl's new web interface which is modern, user friendly and performs well over slow networks such as VPN

- addresses minor bug fixes / enhancements

- has no effect on how you currently use the BarnOwl Rich desktop app (i.e. no changes have been made to the Rich desktop app)

- will enable users to transition to the new BarnOwl web app in preference to the BarnOwl Rich desktop especially when V11.3 is released (scheduled for late 2023) with built-in reporting. Administrative tasks will however remain in BarnOwl Rich

- includes standard Power BI and SSRS reports on request (generated directly from the BarnOwl database)

- NB: Advanced Power BI and SSRS reporting generated off the BarnOwl data warehouse requires an additional purchased license.

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Old look & feel BarnOwl Lite risk register
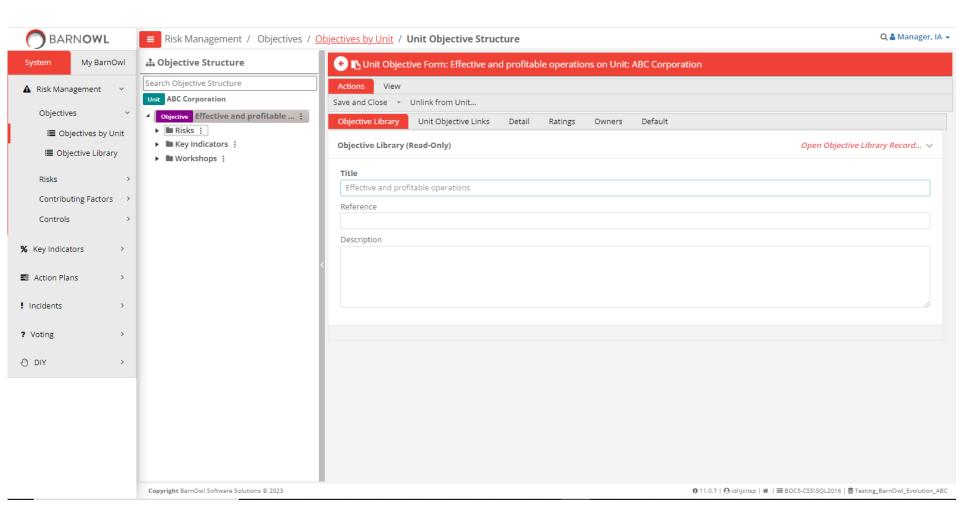
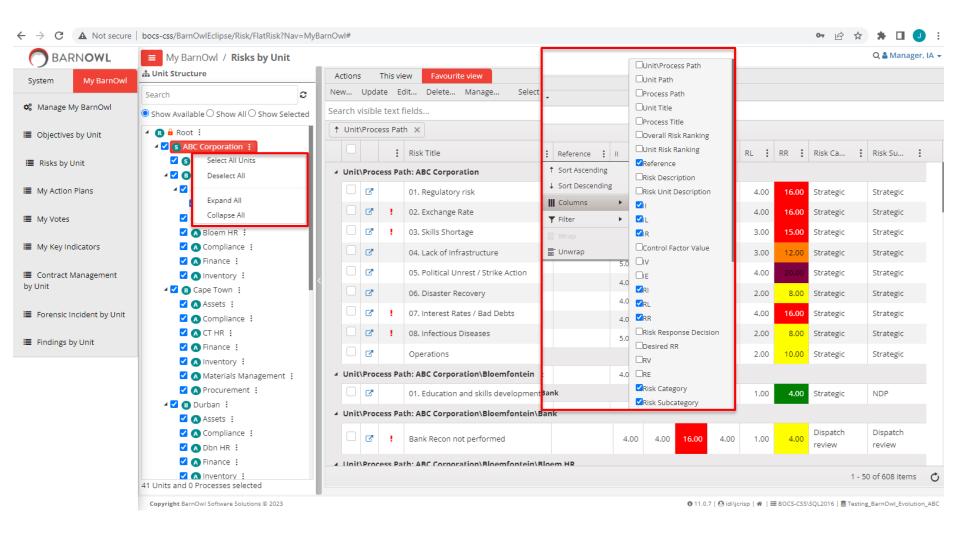# V11 new look & feel risk register

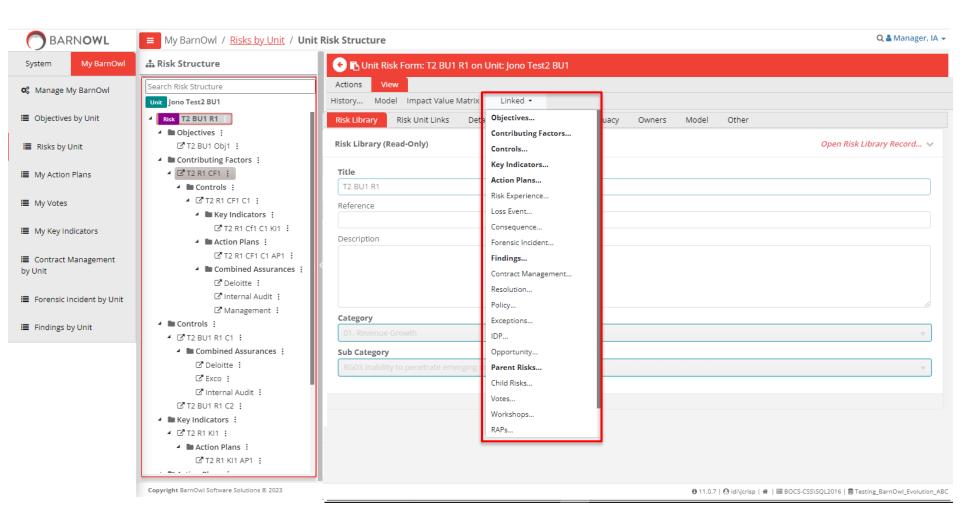# Latest web-based Technology

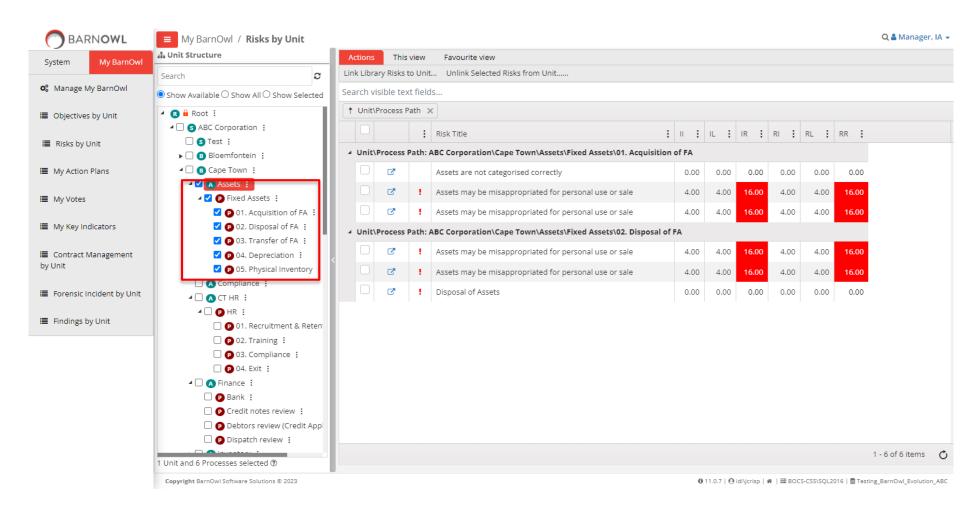# Landing page (v10)

Unit Objective Register
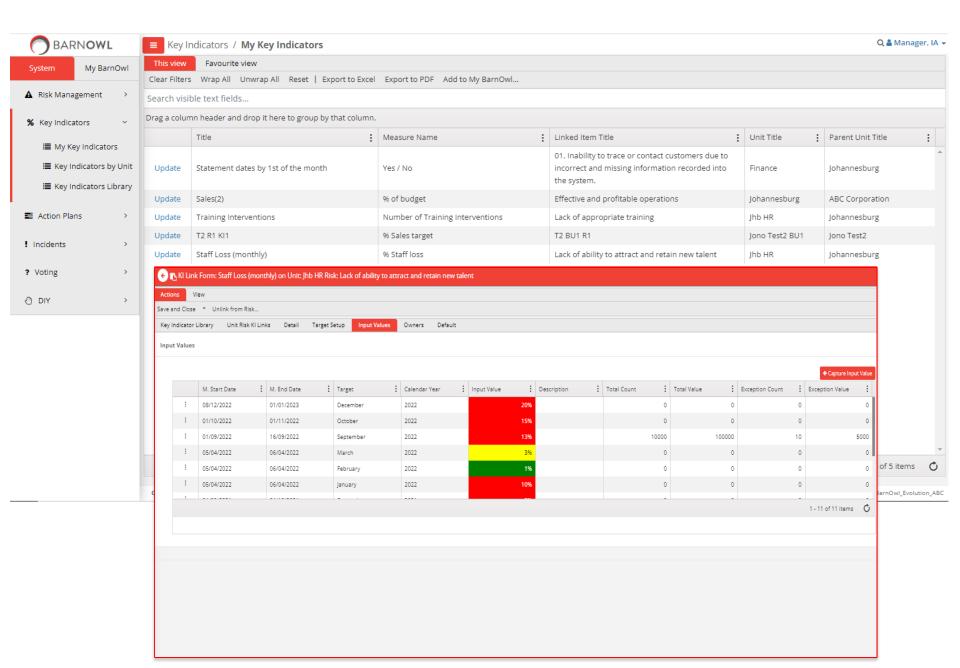
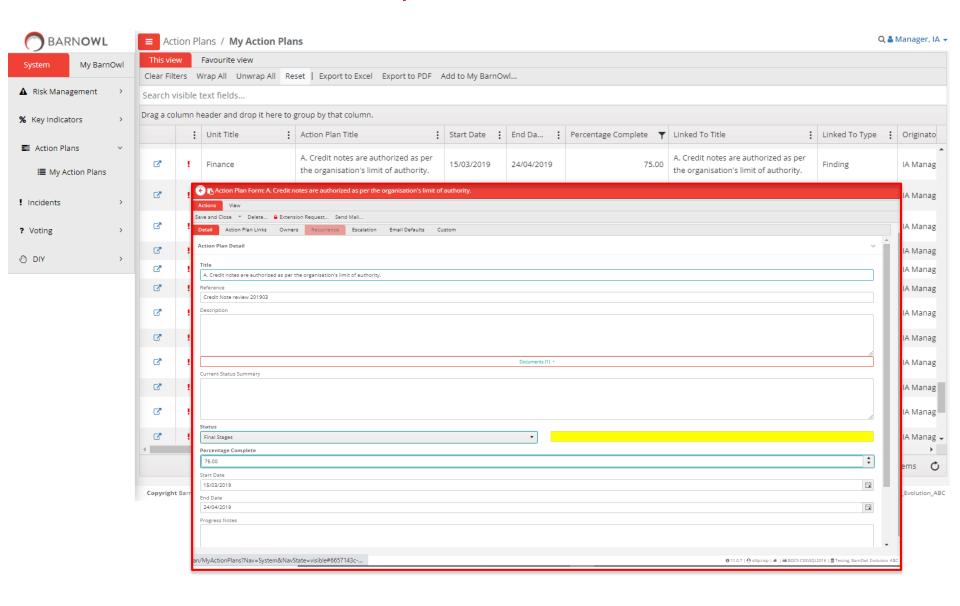# Unit Risk Register

Unit Risk Form
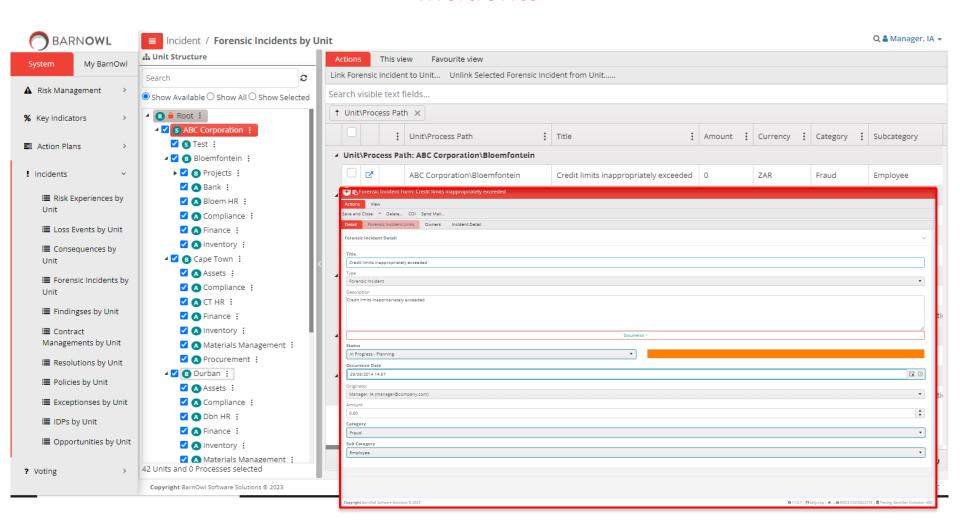
Organisational structure showing units and processes
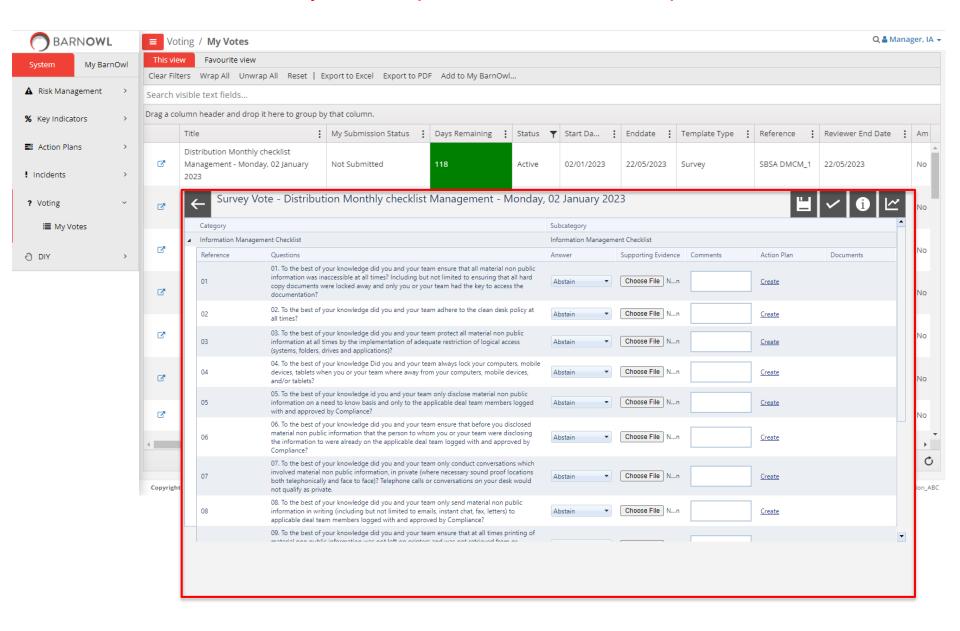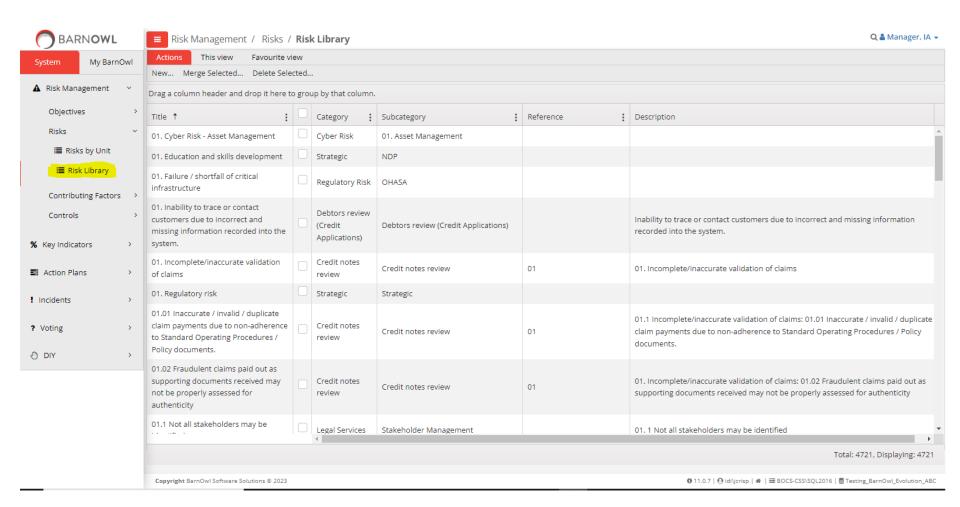
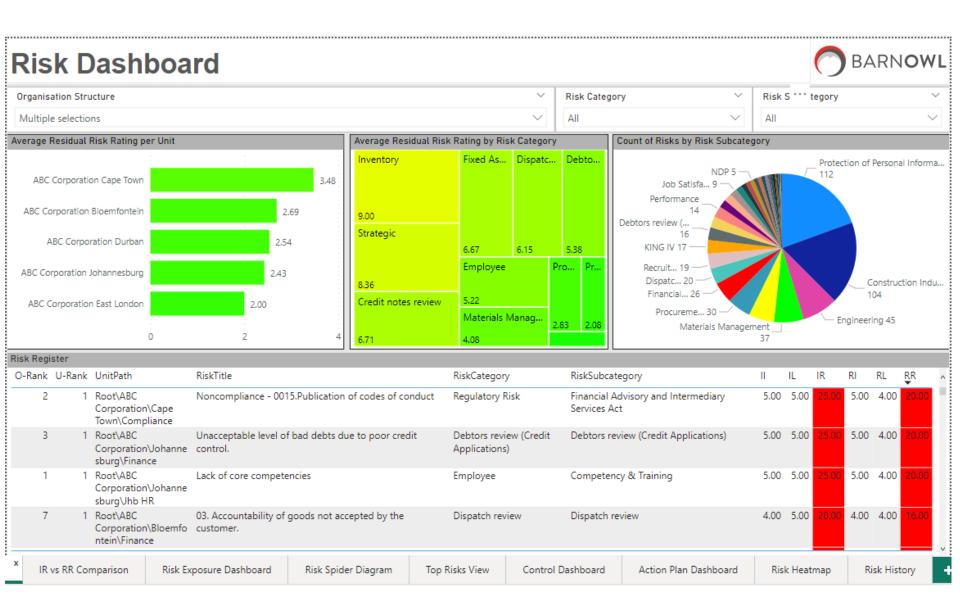# My Key Indicators

My Action Plans
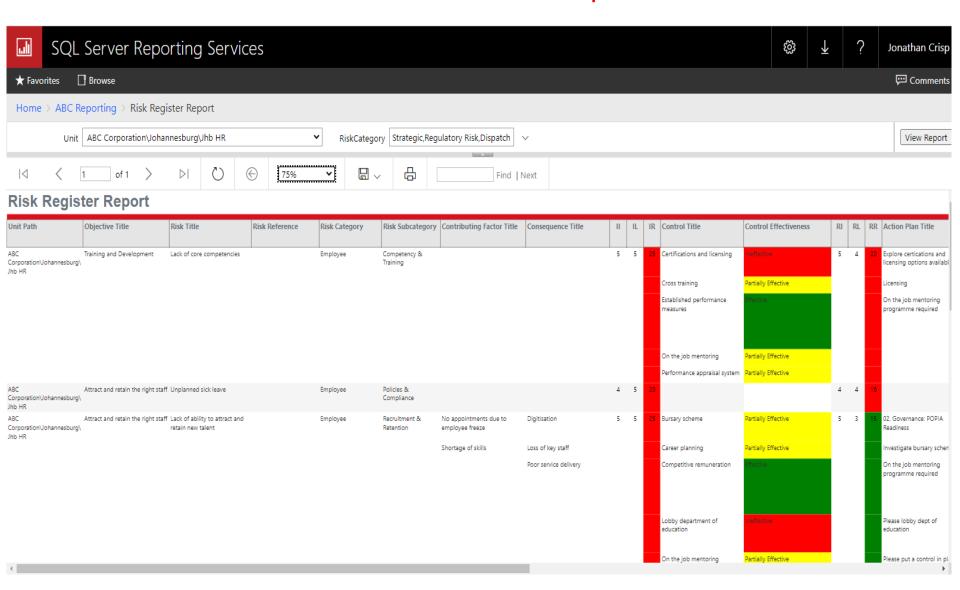
Incidents

My Votes (v11.2 still to come)

Library maintenance (v10) (v11.1 global search on visible columns)

Standard Power BI Risk dashboard

Standard SSRS Risk report

How do I upgrade to V11?

New versions of BarnOwl contain not only the latest new features, but also performance enhancements and fixes. https://barnowl.co.za/knowledge-base/tip-of-the-month/frequently-asked-questions-about-upgrading-barnowl/
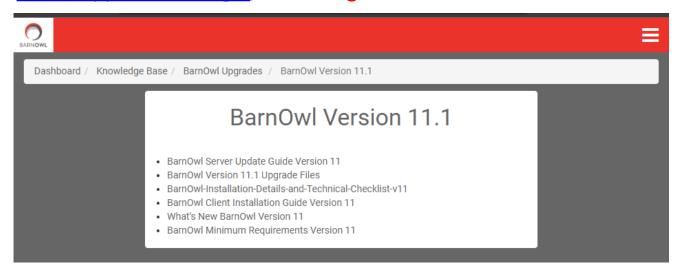
The upgrade process is fully automated with a wizard-driven approach enabling Clients to upgrade themselves. This enables the Client to plan the timing of their Upgrade taking into consideration your IT approval processes, your change management process (i.e. communicating the impact of the new version to your users) and booking BarnOwl training where required:

- Step 1: Download the 'Whats New' document to view what changes have been made to this version. The What's new document includes links to the relevant topic in BarnOwl's online help

- Step 2: Download BarnOwl's minimum System Requirements document and confirm with your IT, that your IT environment conforms to the technical requirements. For example .net framework 4.8 is required for version 11

- Step 3: Download the Guides from the 'Client Hub>Support Hub Login, Knowledge Base' or request a copy from BarnOwl Support.

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How do I upgrade to V11 (Continued)

- Step 4: Ask your IT to download the Upgrade files and follow the Update Guides: Client Hub>Support Hub Login, Knowledge Base:
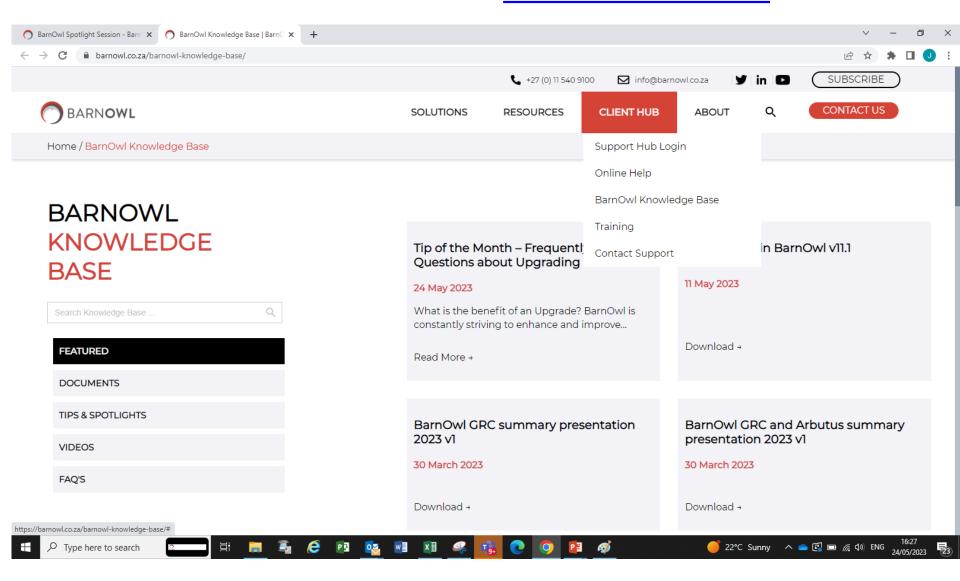

- Make full **backups** of all the databases which will be upgraded. This includes Production and UAT/Training databases.

- Ideally a UAT environment should be upgraded, tested and signed off by the Client BarnOwl champion before the Production environment is upgraded.

- Warn your users that BarnOwl will not be available for the duration of the upgrade. It is important that users don't attempt to log in to BarnOwl while you are upgrading the version.

What do I do if I am unable to Upgrade BarnOwl myself?

If you are unable to upgrade yourself, you can request a quote from your account manager and / or from BarnOwl Support. A quotation will be sent to you for the Technical Resource's time. Upgrades performed by BarnOwl require remote access. If remote access cannot be provided, an additional onsite fee will be charged. Please note that we will only schedule a date for the upgrade, once you have sent through the signed quote and / or Purchase Order and once you (or your IT) has completed the 'BarnOwl installation details and technical checklist>Documents>BarnOwl Installation Details and Technical Checklist' . Thereafter, we will schedule a BarnOwl technical resource. Please expect a lead time of approximately two weeks.

New BarnOwl website: www.barnowl.co.za

https://barnowl.co.za/barnowl-knowledge-base/

What's new document

Version	Release Date
11.1	**9 February 2023**
Public Release of version 11	

Version	Release Date
11.0.1 – 11.0.8	**18 August 2022**
Various stability and performance enhancements	

Version	Release Date
11	**11 August 2022**
All Applications .Net Version Upgraded to 4.8	
Web Site (BarnOwl Eclipse)	

• New Risks by Unit Register
    ○ Risk Custom Fields available in Register
    ○ New Unit and Process Selection View
    ○ New Link Library Risks to Unit View
	• **Standard and Global Register View**
	• **View Processes in Web**
	• **Organisational (Unit) Structure**
	• **Capturing a New Library Item**
	• **Capturing / linking a new register item**

• New Risk Structure View
    ○ Perform quick actions to view linked items Forms, History, Linked AP/KI register
    ○ Quickly link/create items to the Risk
	• **Viewing linked items in a register**
	• **Viewing Item History**

○ Easy navigation within the Risk Context
    ○ New View Linked Objectives Register
    ○ New View Linked Contributing Factors Register
    ○ New View Linked Controls Register
    ○ New View Linked Key Indicators Register	

https://barnowl.co.za/wp-content/uploads/2023/05/Whats-New-in-BarnOwl-v11.pdf

Conclusion

- Modern look & feel: easy and familiar to use

- Easy navigation: embed risk management

- Risk on a page: manage your risks in a simple and structured way

- Performance: great performance over WAN / VPN

- Enhanced functionality: custom field documents, action plan linked object, search visible fields etc.

- State of the art web-based technology: take advantage of leading edge technology

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Thank You

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https://barnowl.co.za/barnowl-knowledge-base/

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