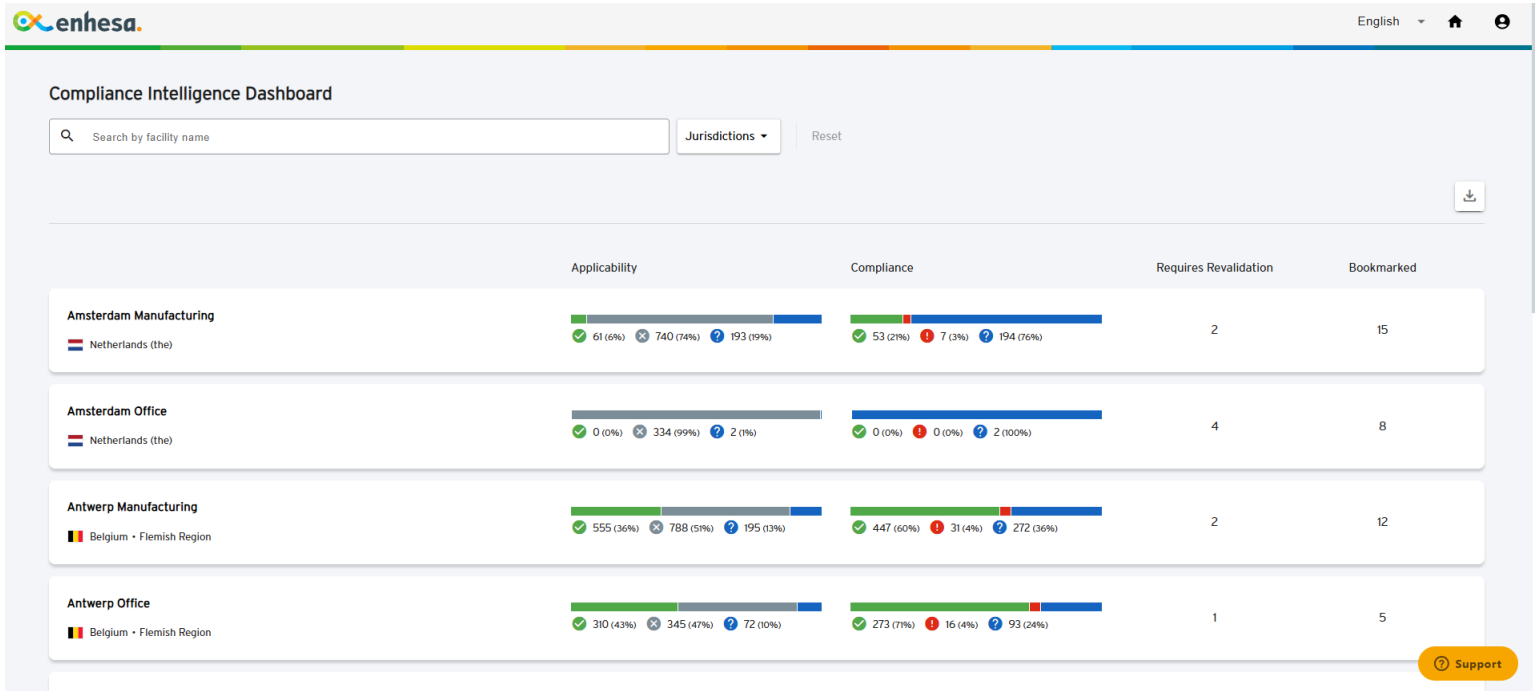


Next Generation Compliance Intelligence Training

Corporate dashboard



The **Corporate Dashboard** has been refreshed with a modern new look and an improved user experience. It provides a comprehensive overview of all listed facilities, including a visual snapshot of their overall compliance and applicability status.

A l**anguage dropdown menu** is located in the top-right corner, allowing users to view information in multiple languages.

Users can easily search for specific facilities and filter results by jurisdiction for streamlined navigation. For each facility, **percentage indicators** and **color-coded graphs** offer a quick visual summary of compliance and applicability performance.

Click the download icon on the top right to **export** a copy of your Corporate Dashboard.

Any pending revalidations are available under the **“Requires Revalidation”** tab. Revalidations reflect updates made to your regulatory content set since your last revalidation or applicability assessment.

Click on a facility name to be directed to the **Facility Dashboard.**

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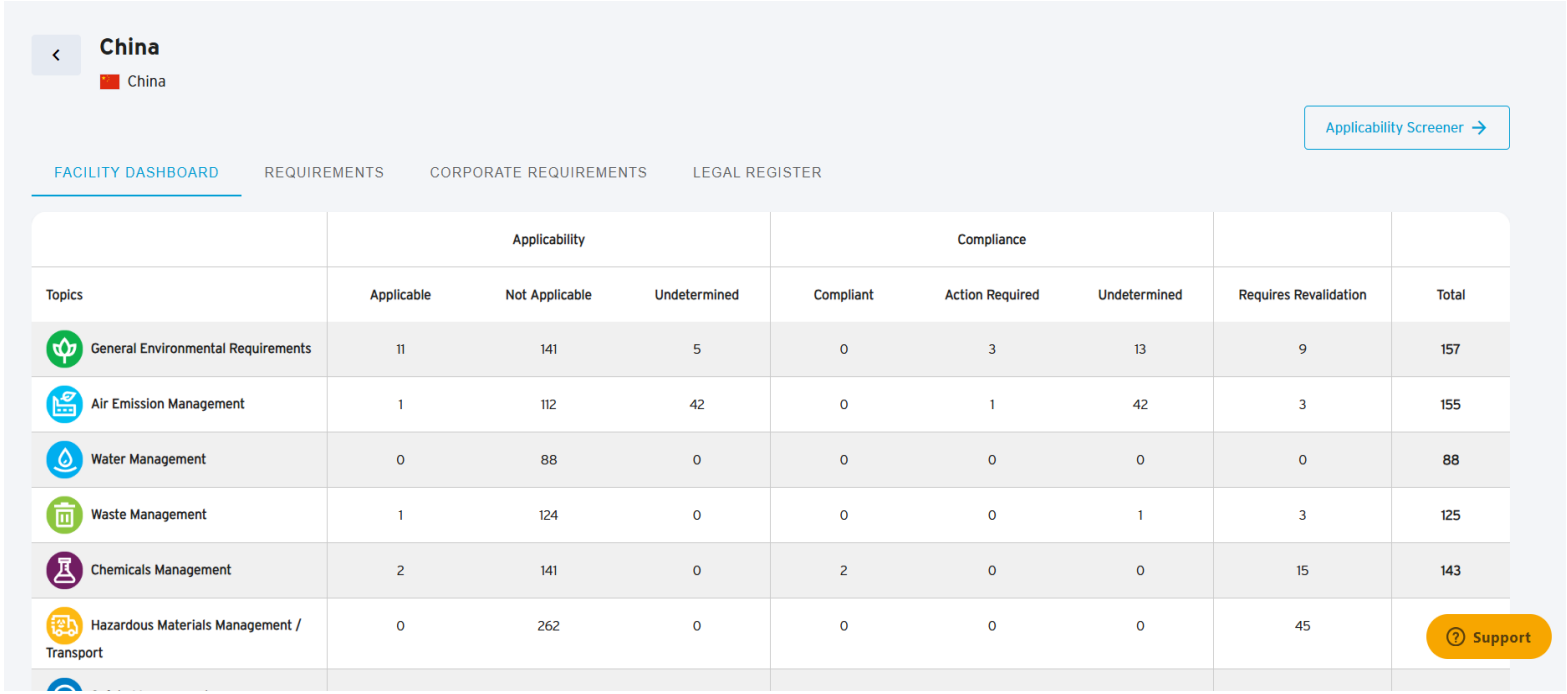
Facility dashboard



Beneath the facility name and jurisdiction, you will find four tabs: **Facility Dashboard, Requirements, Corporate Requirements**, and **Legal Register.**

The **Facility Dashboard** features a grid organized by topic, displaying the number of applicable and non-applicable requirements, as well as the number of compliant and non-compliant requirements. The grid also shows the number of requirements per topic that require revalidation.

To view all requirements, simply click on the **Requirements** tab or select any number in the table to open a filtered view based on your selection.

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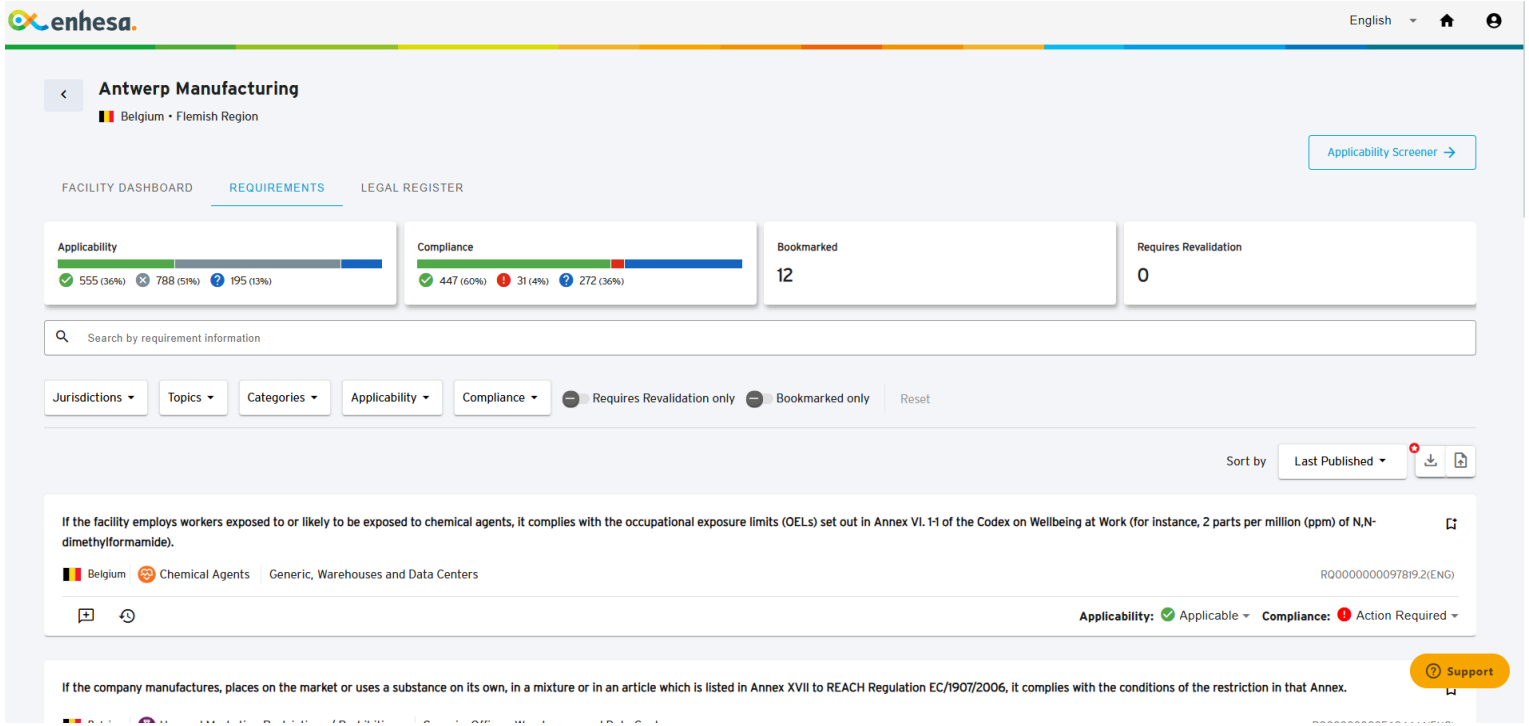
Requirements



The Requirements view gives you a detailed look at all regulatory requirements relevant to your selected facility. Much like the Corporate Dashboard homepage, it offers a clear overview of both applicability and compliance statuses, helping you quickly understand where attention is needed.

From this screen, you can easily access requirements that need revalidation, as well as any that you may have previously bookmarked.

A range of filters allows you to refine the view based on topic, category, applicability, compliance, and more.

If you're looking for something specific, you can use the search bar to type in plain-language descriptions. Our powerful search engine will interpret your input and return relevant requirements and regulations, making it easy to find exactly what you need.

You can also view and leave comments on requirements for better collaboration and organization.

The requirements page is where you can export and upload scorecards for the selected facility.

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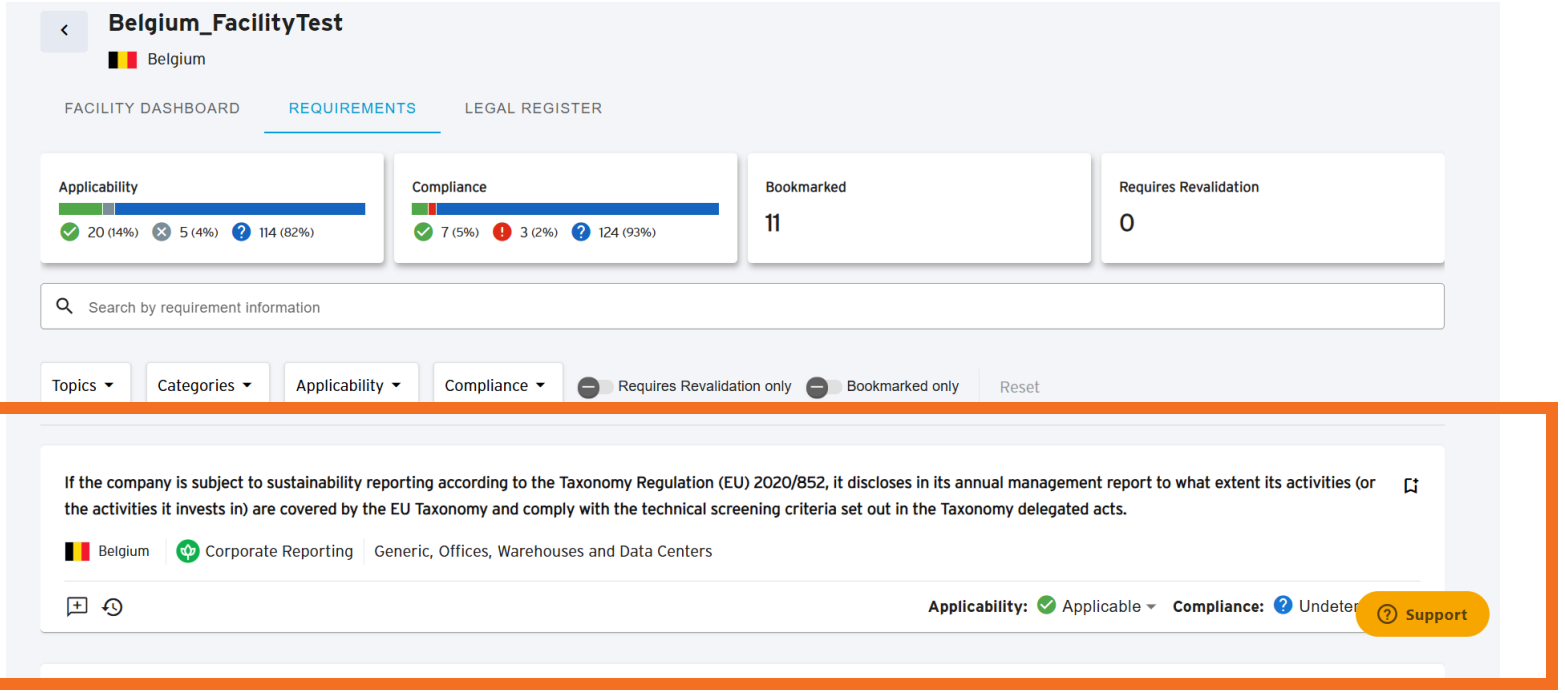
Requirements card



Each requirement card displays the jurisdiction flag, relevant topic, and category. You can also set the applicability and compliance status directly from the list view—no need to open each item individually. Simply use the two dropdown menus located on the requirement card. Your answers will be saved immediately after changing the drop-down selection.

For more detailed information, click into any requirement. This opens a full view where you can read guidance notes, explore linked requirements, and confirm whether the requirement is applicable and compliant for your facility.

This view is designed to make compliance management straightforward and actionable, with all critical information easily accessible in one place.

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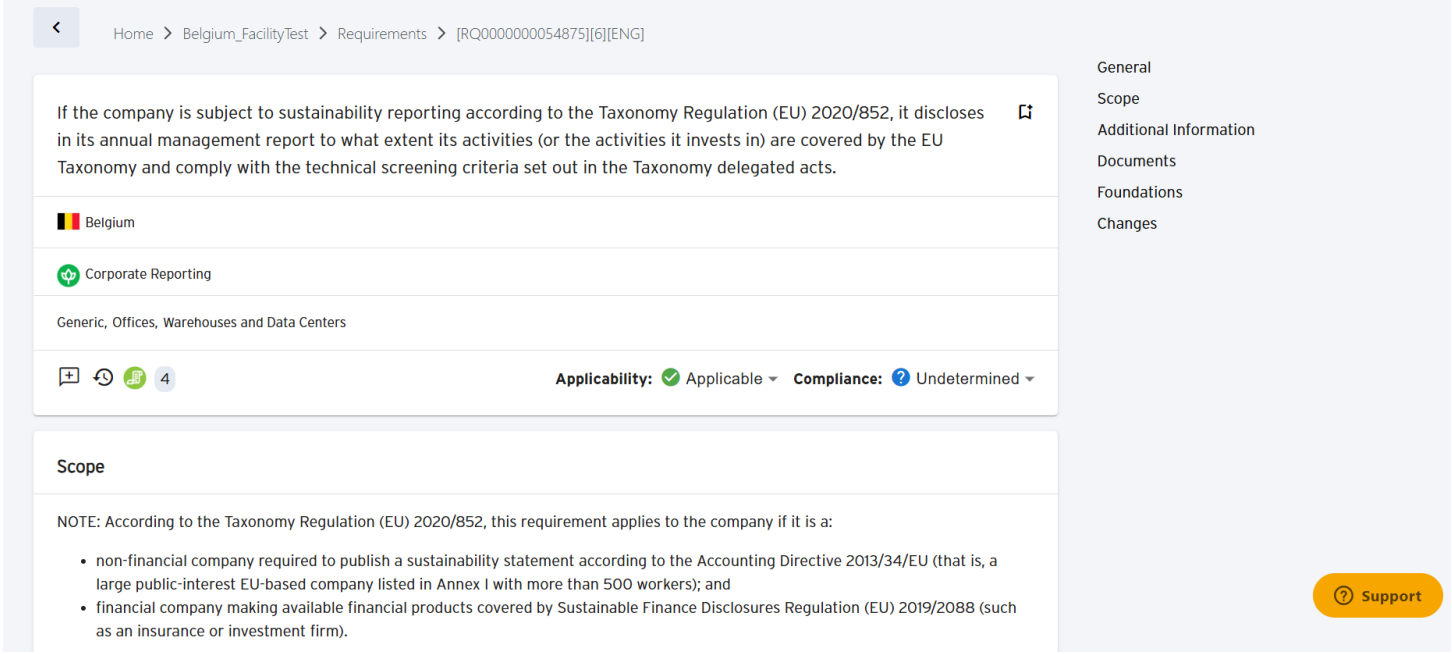
Requirements: Detailed View



As you scroll through the detail view for the individual requirement, information is organized into key sections to help you better understand and evaluate the requirement. This view ensures that all critical details are in one place, allowing for informed decisions around applicability, compliance, and next steps.

General: This is the same information provided on the original requirement card.

Scope: A detailed description of what the requirement covers, including any nuances specific to the facility or jurisdiction.

Additional Information: Notes and clarifications that provide extra context or highlight key considerations.

Documents: Any supporting files or resources linked to the requirement.

Foundations: The official legal sources from which the requirement is derived. They provide the regulatory context and references that establish and justify the requirement.

Change: A log of any past updates or revisions to the requirement, giving you a transparent view of how it has evolved over time.

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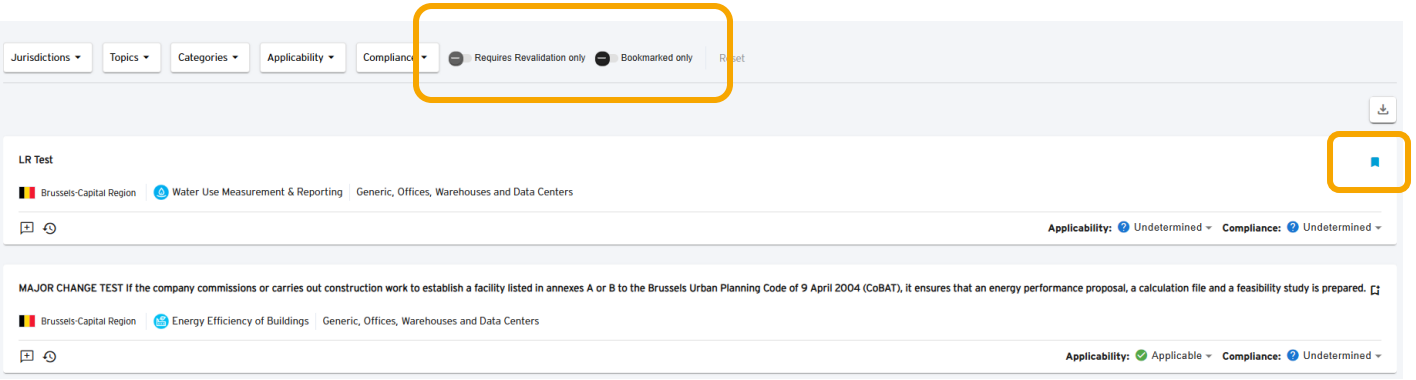
Requirements: What else is new?



Bookmarks:

Each requirement card includes a **bookmark icon** located at the top-right corner. Clicking this icon will highlight it in blue, marking the requirement as **bookmarked** for easy reference later.

To help you stay organized, the Requirements page also includes a **toggle filter** that allows you to view **only bookmarked requirements**. This feature is perfect for grouping requirements that need additional review or follow-up.

Comments and Audit Trail:

At the bottom-left of each requirement card, you'll find two icons:

Comments Icon – Use this to leave notes or feedback for other users to view later. This is helpful for collaboration and tracking important details.

Audit Trail Icon – This shows a history of changes, including:

- When **applicability** or **compliance** was updated
- Any major changes made to the requirement

These features provide transparency and make it easier to track updates over time.

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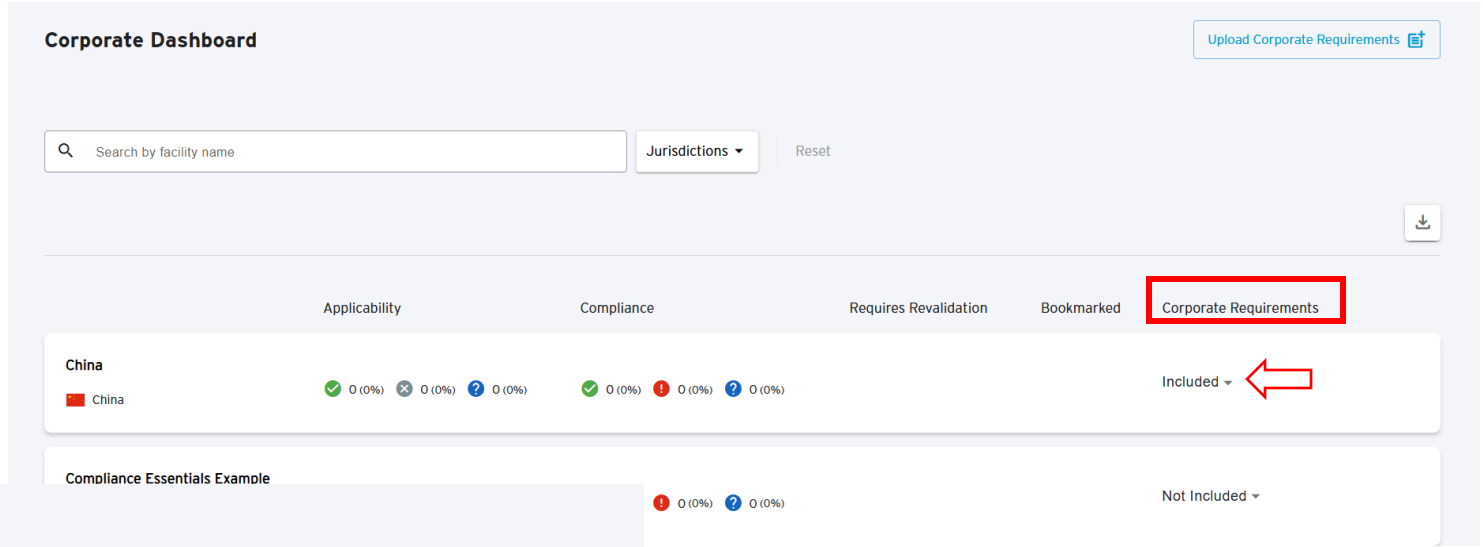
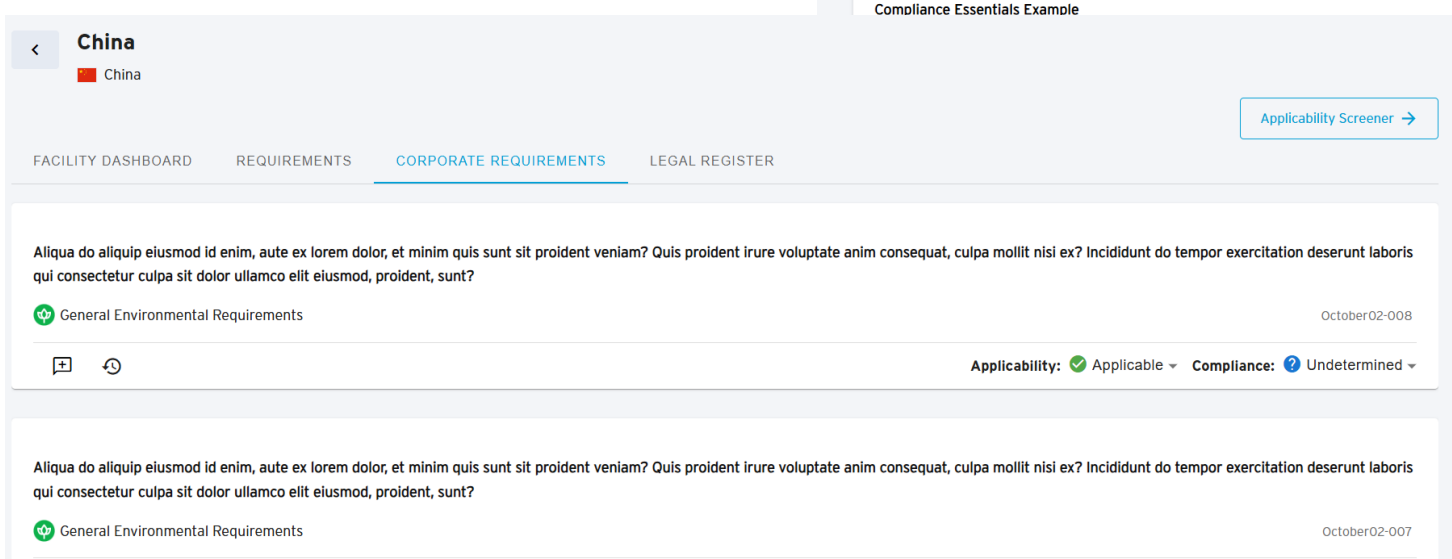
Viewing Corporate Requirements

The Corporate Dashboard provides an overview of which facilities have Corporate Requirements included, as indicated in the **Corporate Requirements** column.





To view the Corporate Requirements, click into the facility of choice and navigate to its dedicated Corporate Requirements tab.

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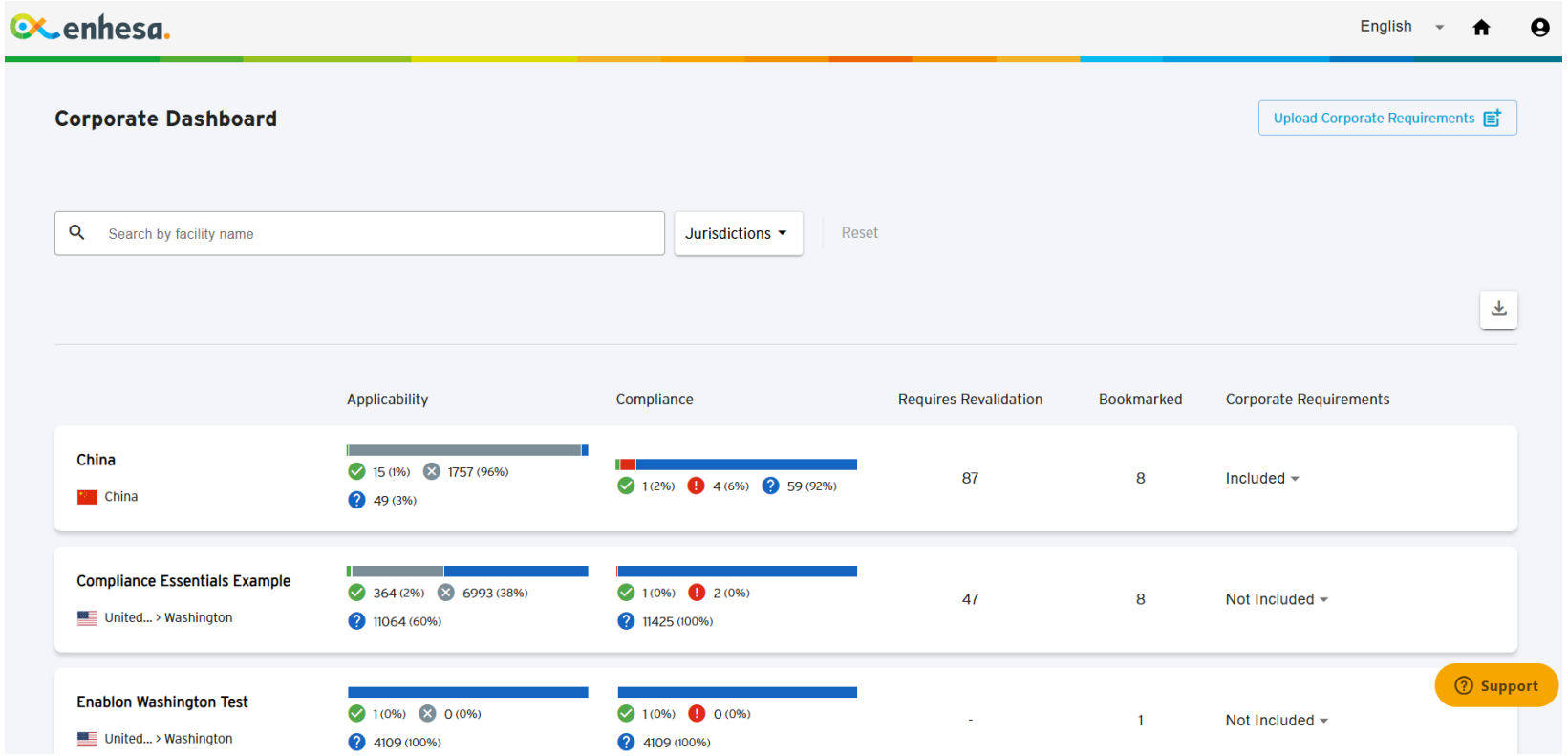
Uploading Corporate Requirements



Clients can upload custom Corporate Requirements and assign them to one or more facilities by reaching out to their CSM or sending an email to services@enhesa.com.

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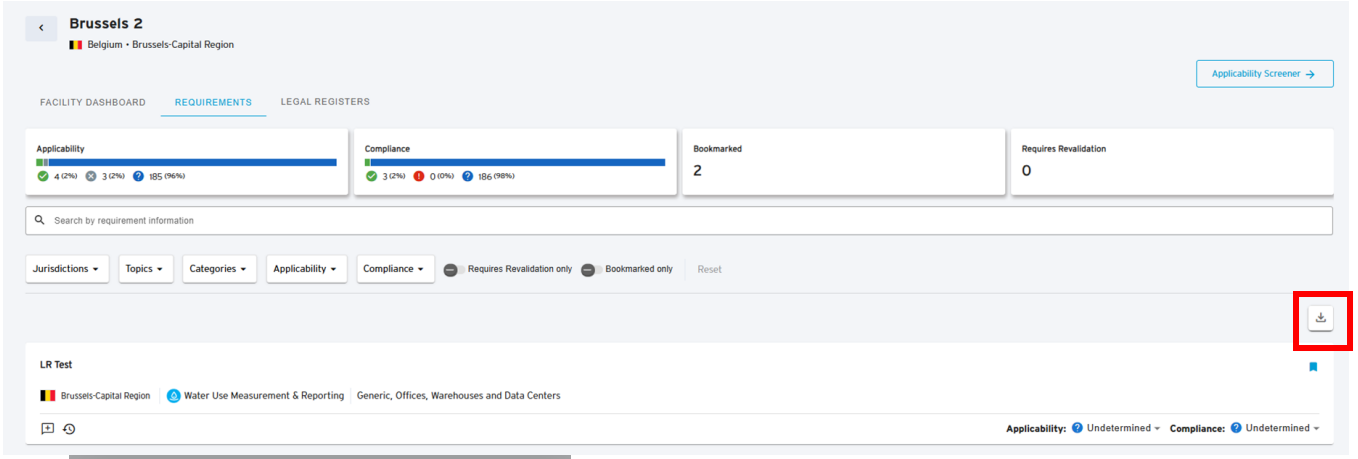
Downloading a Scorecard

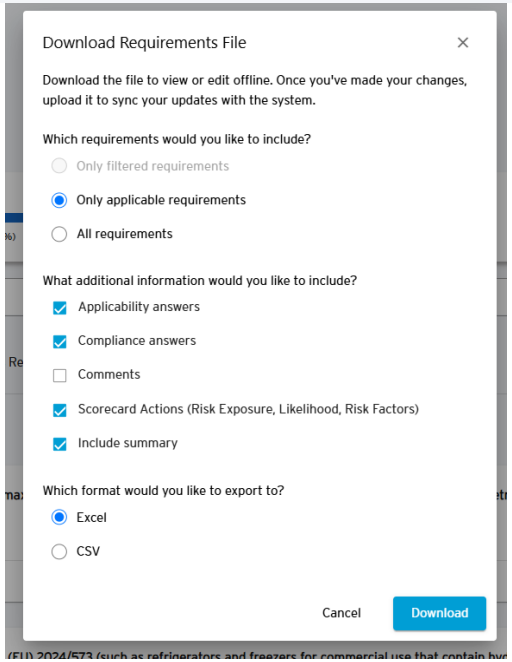
On the **Requirements page**, you'll find a **Download** button located at the right corner, under the requirements filter options.

This button allows you to download your scorecard quickly and easily.

To simplify your workflow, we've introduced multiple download options. You can export the scorecard in different ways by applying filters, such as:

- **All requirements**
- **Only filtered requirements** (if you've applied filters to the Requirements page, only those will be exported)
- **Only applicable requirements**
- **Applicability answers and compliance answers**
- **All comments or just the latest comment**
- **Scorecard Actions**
- **Format (Excel or CSV)**





What's New?

- The scorecard now contains **fewer tabs**.
- We've removed **macro-based scorecards**, making the process faster and more reliable.
- The new scorecard layout uses **filters within a single tab**, so you can navigate and customize your view without switching between multiple tabs.

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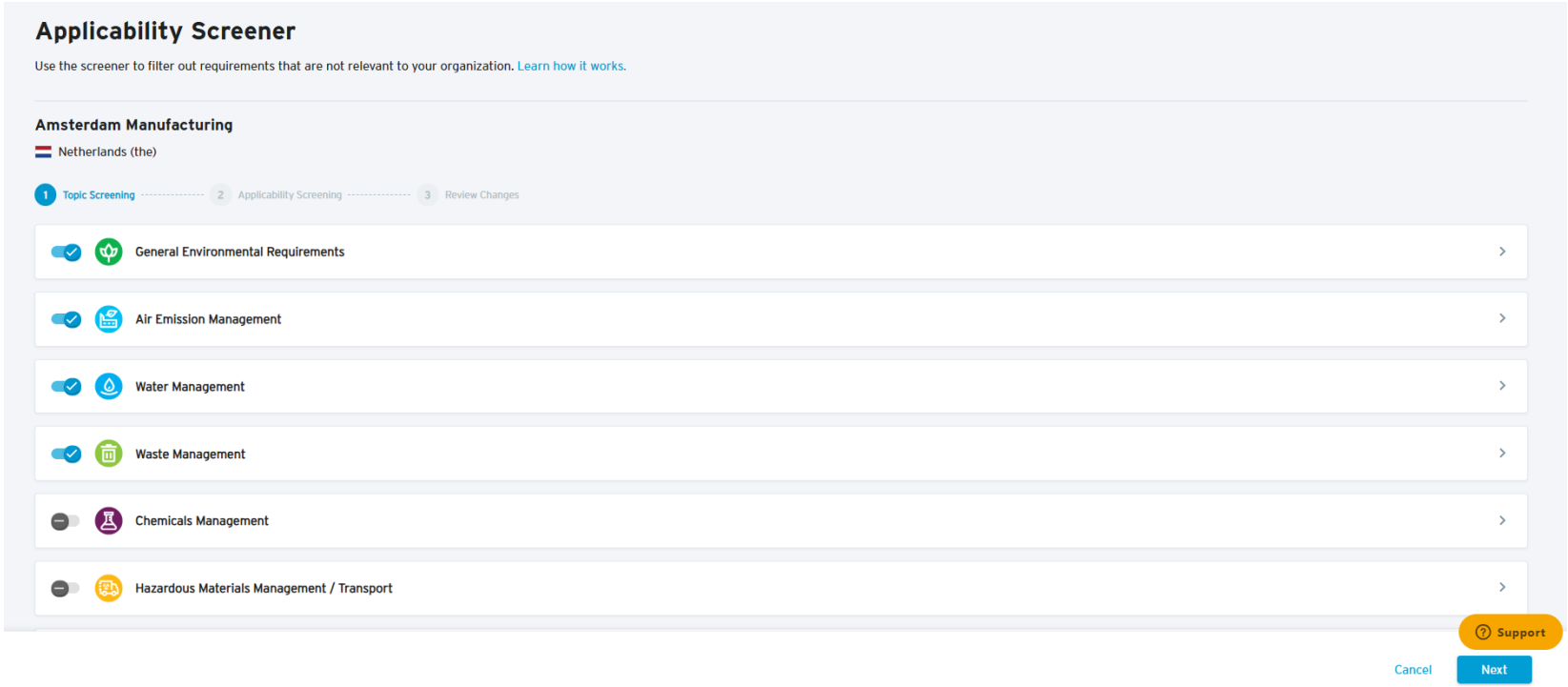
Applicability Screener – Topic Screening

Use the Applicability Screener to filter out requirements that are not relevant to your organization.

Filter by Topics:
Each topic and its subtopics include toggles that can be turned **on** or **off** with a simple click to indicate applicability.

Toggle Behavior:
Turning a topic OFF: All linked requirements are automatically set to **Not Applicable**.



Turning a topic ON: Any linked requirements will be reset to **Undetermined**, allowing you to review and update them as needed.

- Requirements already marked **Applicable** remain unchanged.

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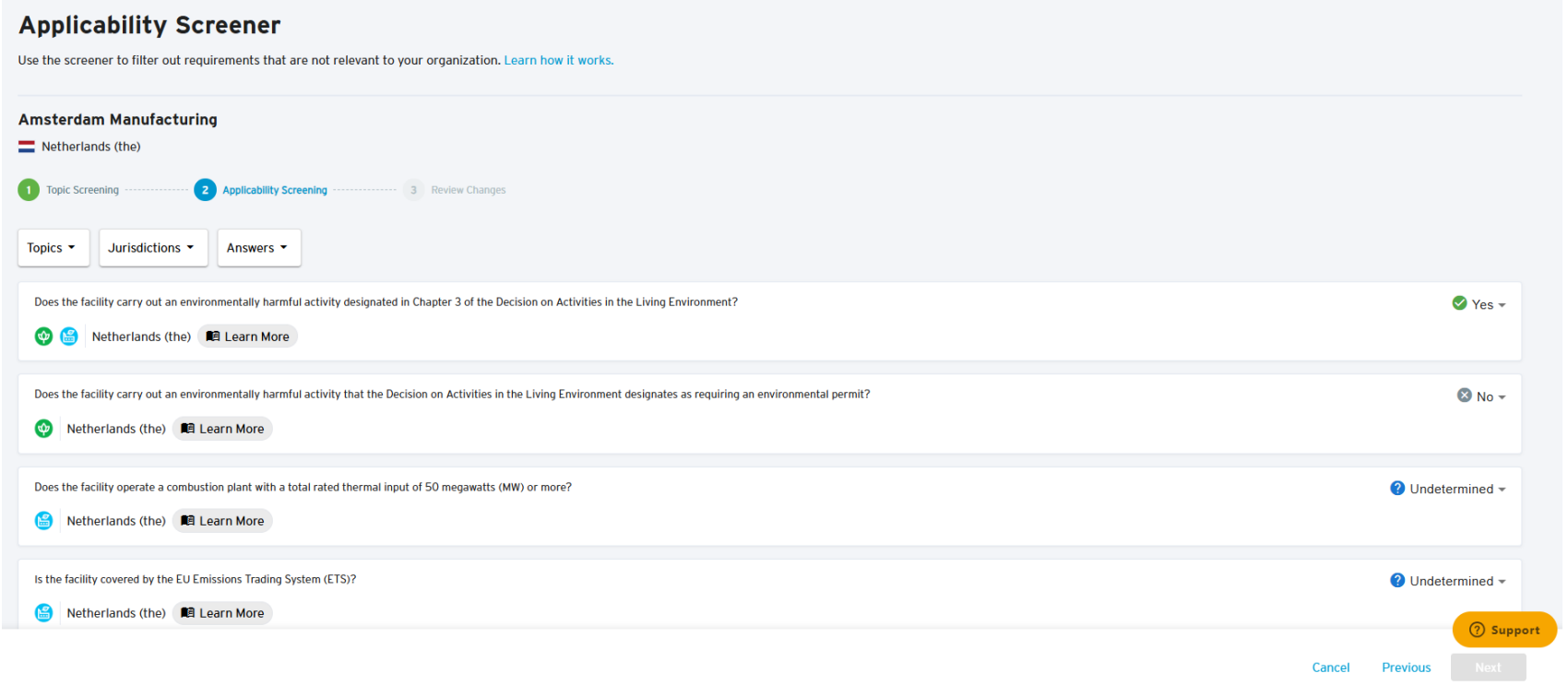
Applicability Screener – Applicability Screening

- Use the **Topic**, **Jurisdiction**, and **Answer** filters at the top of the page to quickly organize and navigate your workflow.
- Each question has icons in the bottom-left corner representing the related topic(s). You can also review guide notes for any question by clicking "Learn More." Keep in mind that these questions are jurisdiction-based.
- Once you have updated the answers in the Applicability Screening step, click **Next** at the bottom of the page to review the changes.



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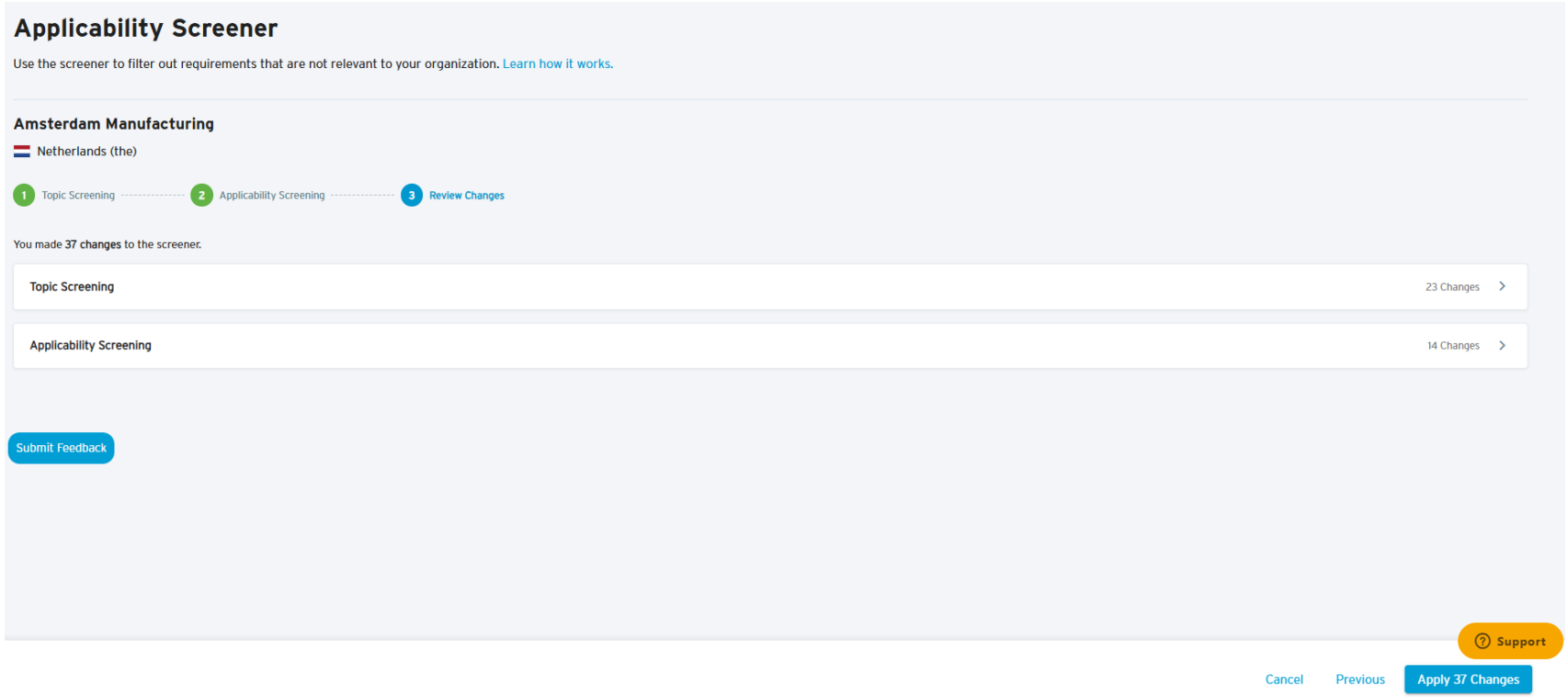
Applicability Screener – Review Changes

The final step of the Applicability Screener is to review your changes. Use this step to confirm that all updates are accurate and intentional. Once you are satisfied, click **Apply Changes** to save the updates directly to the selected facility.

You will then be returned to the Facility Dashboard, where you can view the updated applicability and compliance status for the requirements associated with the selected facility.



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Legal Register

The **Legal Register** tool allows users to view all regulations applicable to a specific facility. It can be accessed from both the **Facility Dashboard** and the **Requirements** view.

The Legal Register page includes a **search bar** and **filters** that allow users to refine results by:

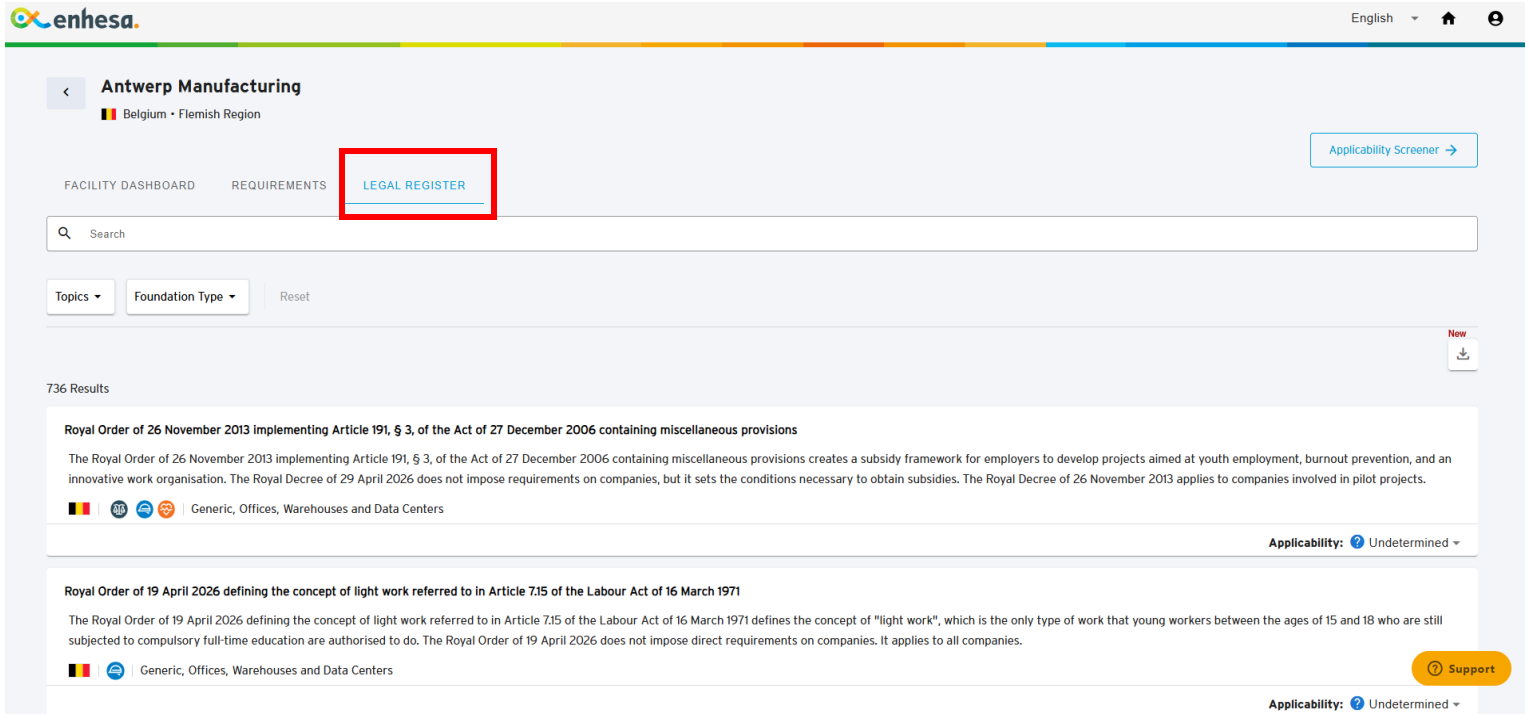
- Topic category
- Requirement type:
  - **Informative** (no related requirements)
  - **Active** (contains related requirements)

Each regulation is displayed as a regulation card that includes:

- Regulation name
- Regulation number
- Summary

Each regulation card also includes a **drop-down menu** where users can select the **Applicability status.**

Click on the download icon in the top right to export your Legal Register.



Clicking into a regulation card provides additional details, including:

- General information
- Summary
- Scope
- Issuing Authority
- Definitions
- Related Requirements (shown when viewing an active regulation)

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