RELEASE NOTES

Version:

V4.2

Date:

10/09/2018

Centrik
YOU HAVE CONTROL

Contents

Summary

Centrik V4.2 includes some new tools for managing your data, further enhancing Centrik's compliance with GDPR and your obligations as a 'data controller':

- **Data Retention** – configurable data retention policies and actioning of expiring data
- **Limiting Centrik Support access to your data –** via the new Centrik Support role, and Elevated Support Access Request process where additional access rights are required by us

Further to these changes, this document gives an overview of other new functionality available in **Centrik V4.2**, including:

- **Management of Change** workflows added to the Management Module**,** supporting your organisation through complex change processes.
- Full text search and enhanced versioning of documents within the **Documents Module**.
- Significant enhancements to reporting and the **Safety Module**, including simpler forms via optional form sections, a new ERC view, and better publishing functionality.
- Simplified training record updates within the **Training Module**.
- New features in the **Equipment** and **Tasking Modules**.

Release Classification

Minor Release	Minor releases include new features and enhancements to existing Centrik functionality. All changes are designed to be intuitive with no or limited re-training of users required. Users of the Centrik iPad app may need to resynchronise their apps to take advantage of any enhancements to offline app functionality. A minor release may occasionally require an app version update (via the App Store) to take advantage of new features, but old app versions will continue to function correctly in the meantime. Minor releases are communicated to all customers in advance in the form of a Release Notes document which outlines the new features and changes included in the release. Customers are provided with the Release Notes at least 3 business days before the planned deployment to their production systems and are invited to preview the release on their Test Systems.

Data Retention

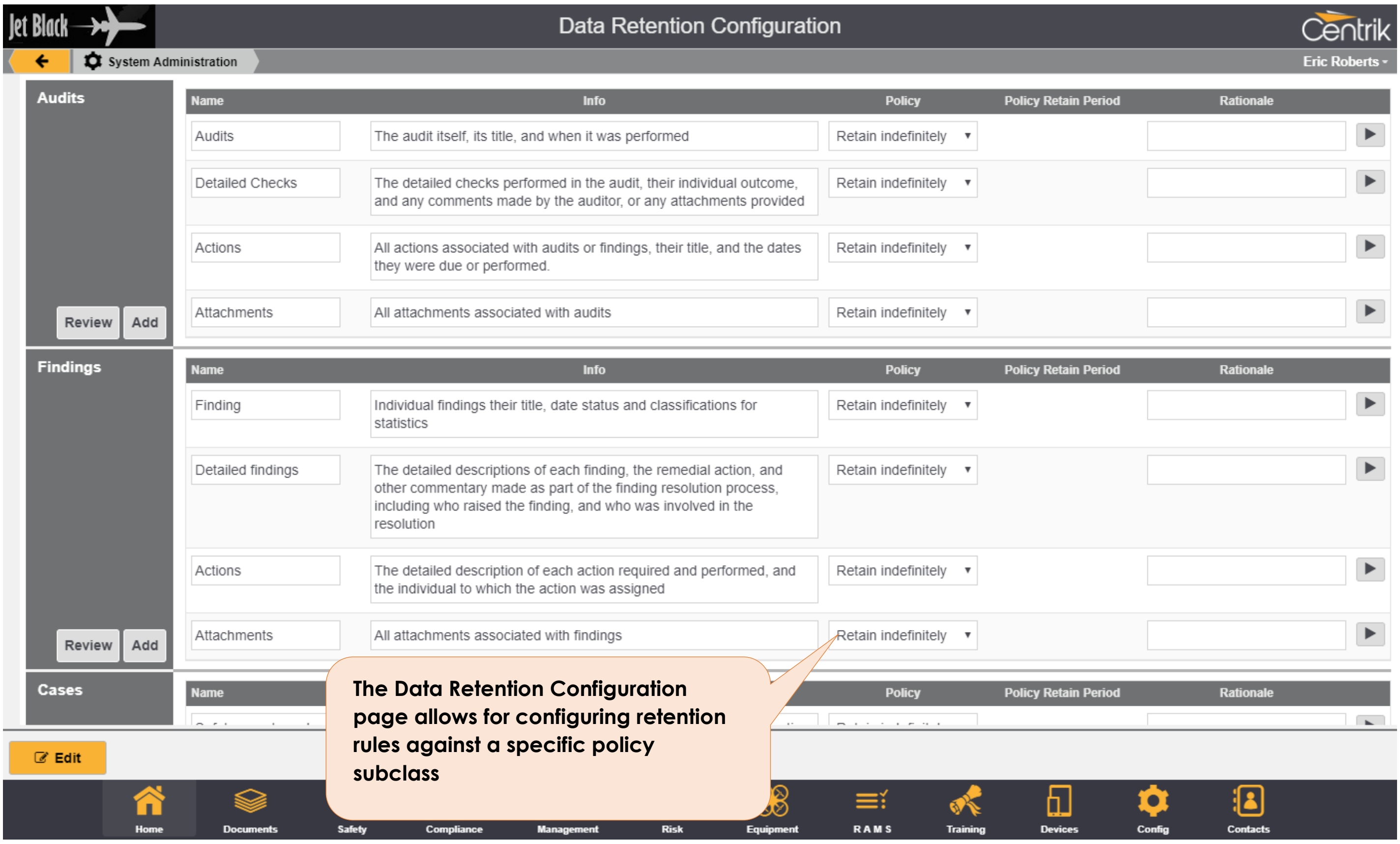
Configuring Data Retention Policies

Centrik V4.2 provides a mechanism for an organisation's nominated Data Protection Officer to set up data retention policies for 'Personally Identifiable Information' (PII) that is stored within Centrik.

Users who have been granted a new access right 'Data Protection Officer', may access the new Data Retention Configuration page. This is used to set up policies to affect how PII should be retained in Centrik.

Retention policies are grouped into 'Policy Classes' which roughly correspond to the top-level data entries within the modules in Centrik, for example Audits and Findings which belong to the Quality module, Meetings and Workflows which belong to the Management module, and Cases which belong to the Reporting module.

Each policy class contains a set of subclasses based on the data entries that exist in that policy class. For example, in the case of the Finding policy class, the subclasses that can be set up are Findings, Detailed findings, Actions and Attachments.



Every subclass is configured with a policy determine how long data should be retained for, and what happens when it expires. When data expires according to a policy, the Data Protection Officer or other users with sufficient access rights are prompted to review the data and action the policy (see *Actioning Data Retention Policies*, below).

Each subclass policy will follow one of three policy retention rules:

1. **Retain Indefinitely**

   No data protection processes will be applied. This is the default retention rule.

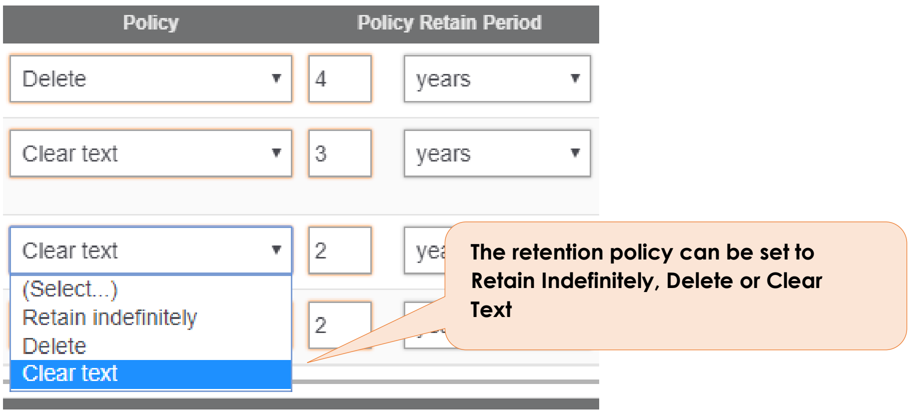
2. **Delete**

   Delete will **permanently and irretrievably** delete the records governed by that policy. As per GDPR regulation any data deleted will no longer be recoverable, even by Centrik staff.

3. **Clear text**

   Clear is used to remove data fields whilst retaining the overall record. In the case of free text, the value will be replaced with the text "[CLEARED] Text has been cleared in accordance with Data Protection Compliance". In the case of Contact details, the Contact will be replaced with the text "Cleared User". As with Delete, these changes are permanent, and the original data will be irretrievable.

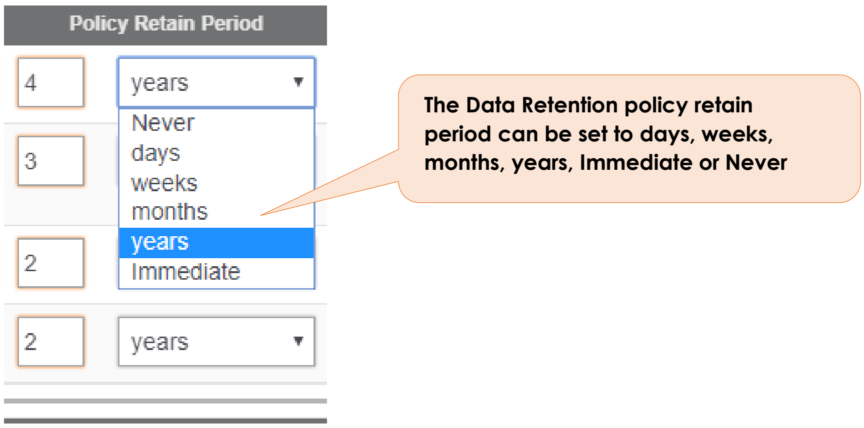
Due to the risk of data loss if Centrik is misconfigured in this area, Centrik support will be happy to assist you before you set either the Delete or Clear text options.



Policy Retain Period

Both the Delete and Clear text options specify a policy retain period, which specifies when the policy comes into effect for each matching item of data held within Centrik. This allows the Data Protection officer or users with sufficient access rights to review items that are due to be deleted or cleared. Once reviewed, you may either proceed with applying the rule or exempt the item(s) from data protection action.

The policy retain period can be set to Days, Weeks, Months, Years, Immediate or Never. If the Policy Period is set to 'Immediate' then all records will be subject to the policy now. If the policy period is set to 'Never' then the policy will never apply.



Policy Info

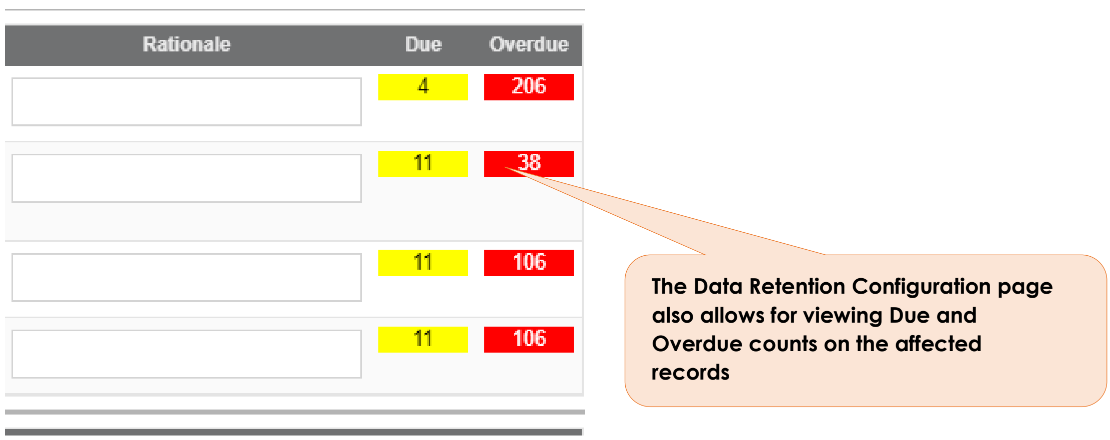
The Policy Info column offers a concise description of what data will be affected by application of that subclass policy. This helps to set up the Policy retain rules.

Policy Rationale

The Data Protection Officer can enter a rationale justifying the policy retention rule that has been set in place against that policy.

Due/Overdue Totals

The due and overdue totals show the total number of records on a policy that are nearing or passed their target date for processing. Items are considered due when they are within 30 days of needing processing (shown in yellow), and items which are overdue are shown in red.

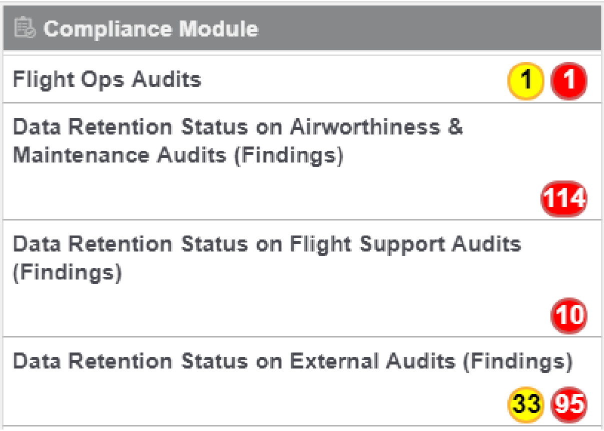


Actioning Data Retention Policies

Dashboard Alerts

The home page of Centrik provides access to dashboards with the Data Retention Status of each Policy Class. The dashboards will be visible to those with management access rights on the corresponding module that the Policy class belongs to. The Dashboard shows the Due and Overdue counts that need review.

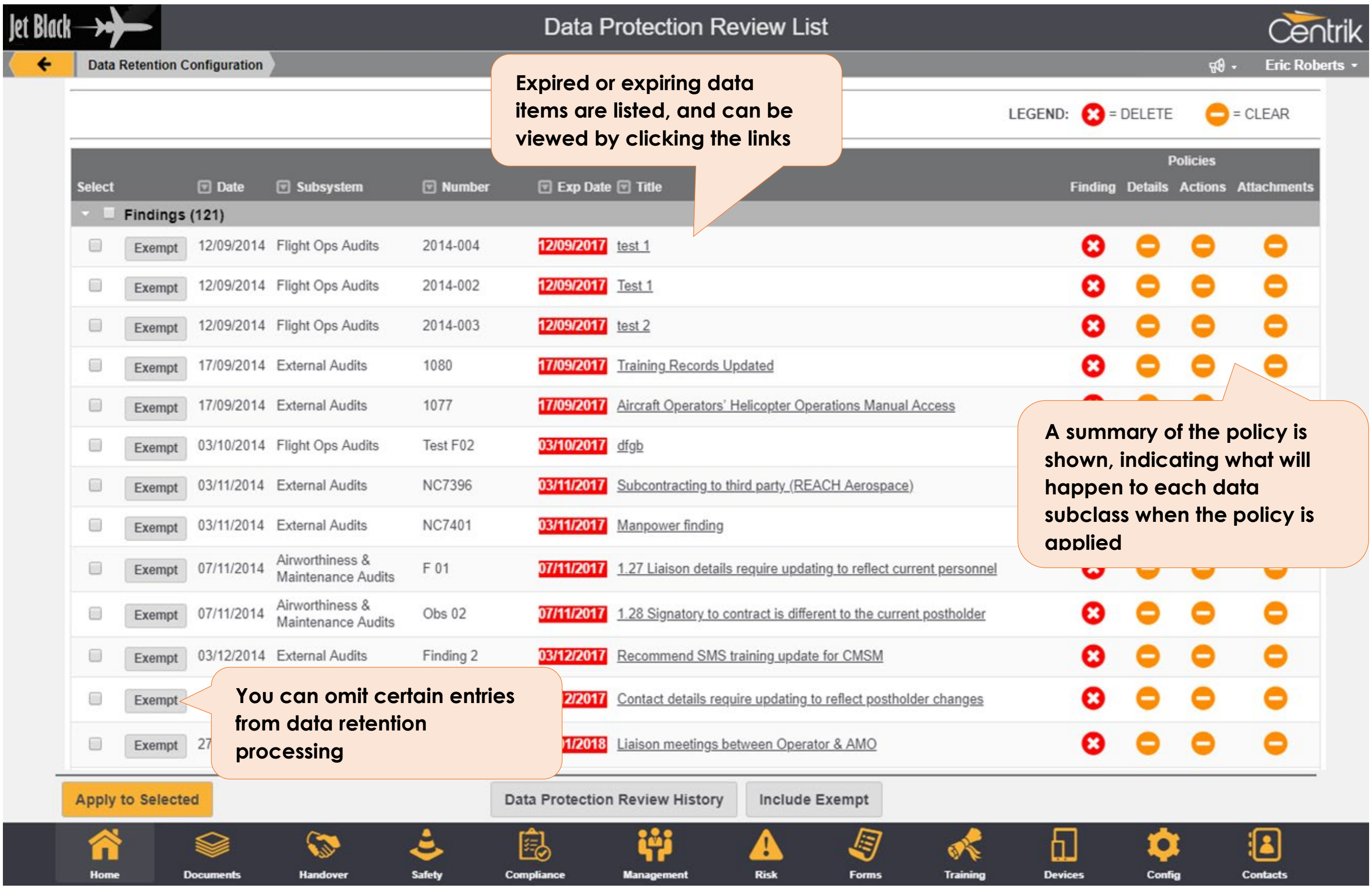
Clicking on a dashboard entry will redirect the user to a read only view of the Data Retention Configuration page for just that Policy class.



Data Protection Review List

The Data Protection Review page lists the entries for a corresponding Policy class that are Due or Overdue for review. This page can be accessed via the Data Retention Configuration page.

The Centrik Module Manager or the Data Protection officer can review the list of entries on this page and decide to either Apply the policy rule or 'Exempt' the entry from the policy.



Data will be **permanently and irretrievably** cleared or deleted when the **Apply to Selected** button is clicked. Centrik support will be happy to assist should you have any queries ahead of executing this operation.

Exempted data is being permanently excluded from expiry.

Centrik Support Access to Your System

As part of our contract with you, we already have committed to keep your data safe and confidential. You are the sole owner of the data, and we do not use it for any other purpose than supporting your business.

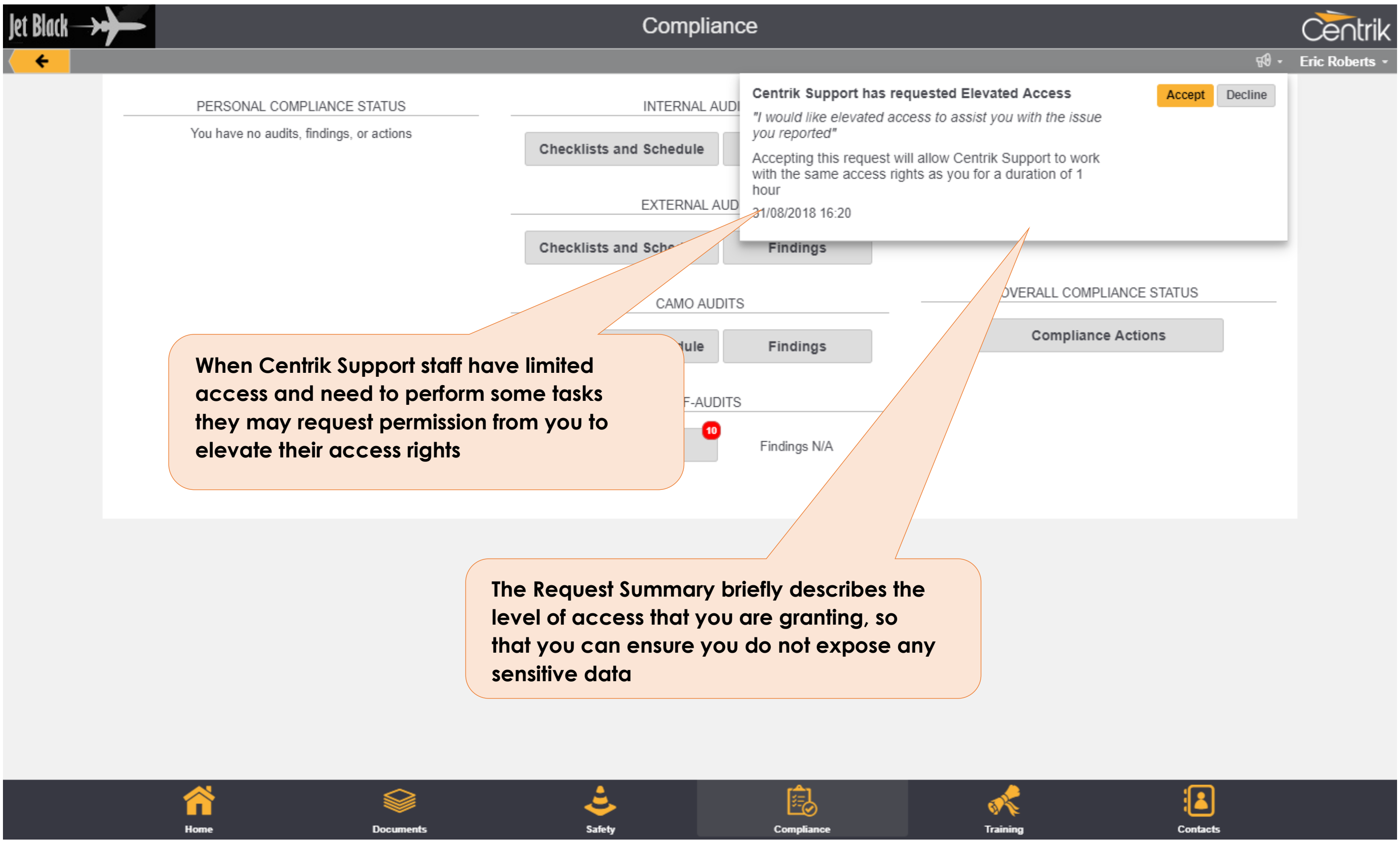
To support you, Centrik Support has read access to your data, and uses it to answer user queries, explain functionality, and to reproduce any issues you encounter. All members of our staff have signed confidentiality agreements, and are externally vetted, which includes criminal records checks.

If you as 'data controller' require a higher level of protection of your data, you can restrict our access. We are introducing new functions in Centrik V4.2 to help you with this:

- **You may configure the default access rights of the *Centrik Support* role** within the Contacts module. This role applies to all Total AOC staff. This allows you to specify exactly which parts of Centrik can be accessed by us, in the same way you manage access rights of your own users in Centrik.
- When a member of the Total AOC team requires additional access to fulfil a customer request or for any other reason, a new ***Elevated Support Access Request*** must be lodged by Total AOC and approved by a customer user, granting extended access rights for a limited amount of time.

Elevated Support Access Request

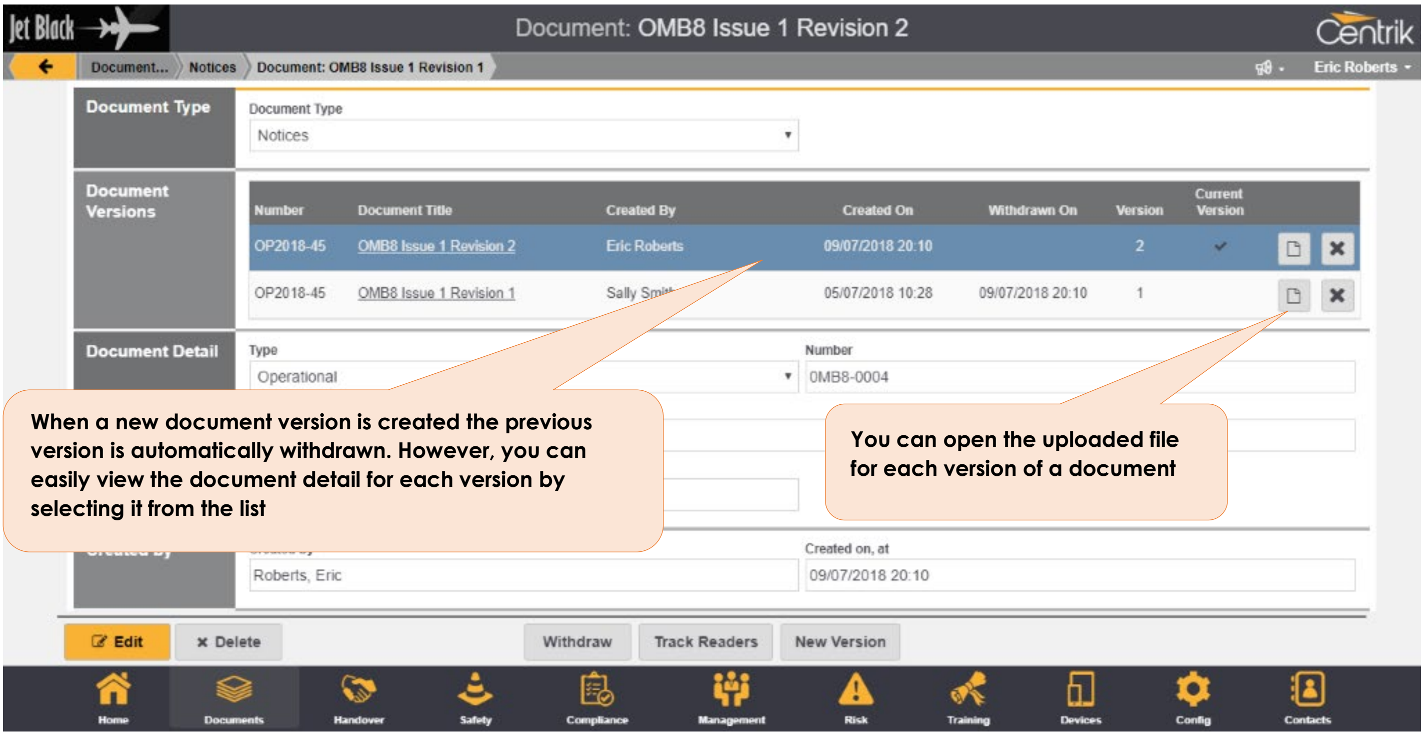
When Centrik Support require access to your system over and above that granted by the *Centrik Support* role, you will receive an elevated access request via Centrik as shown in the screenshot below. This allows you to grant access up-to-and-including your access rights within the system.



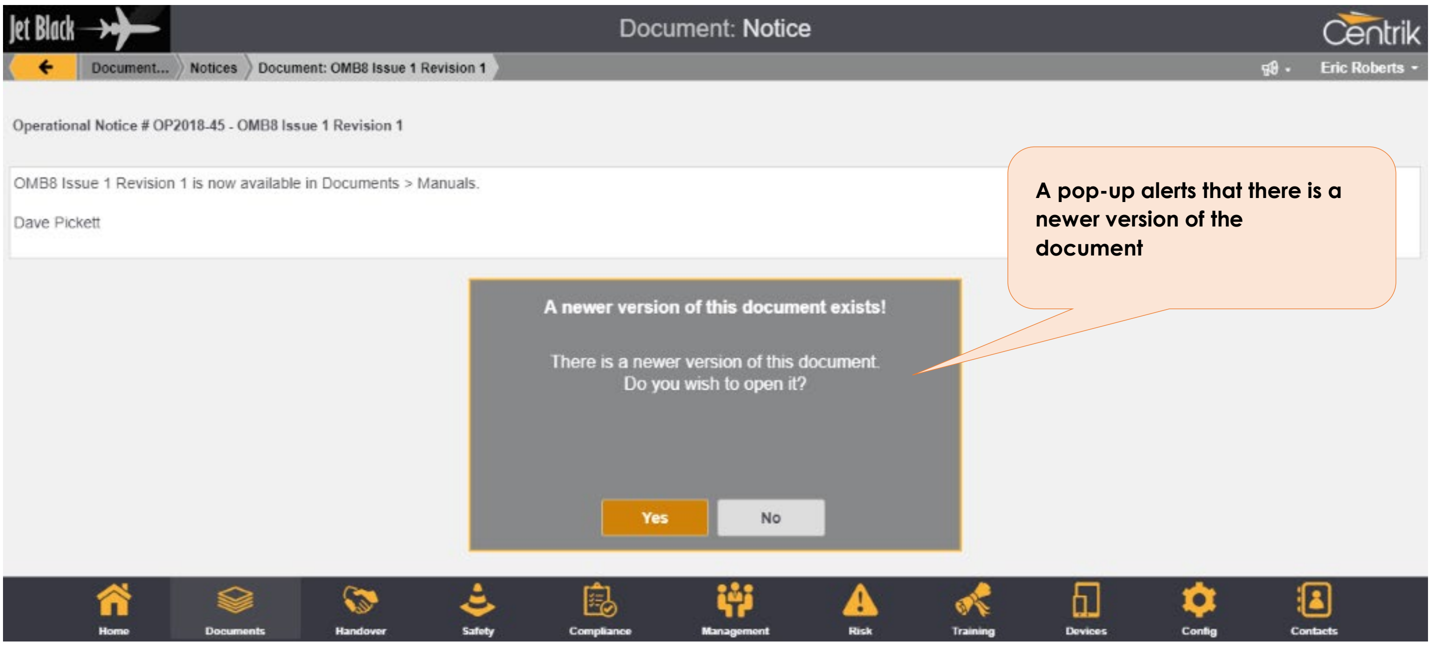
Documents Module

Document Versioning

Previous versions of Centrik have allowed you to create a new version of a document, however new to Centrik V4.2 is the ability to view previous versions of a document. You can also reinstate an older document version as the current version, which records an audit trail for referential purposes.

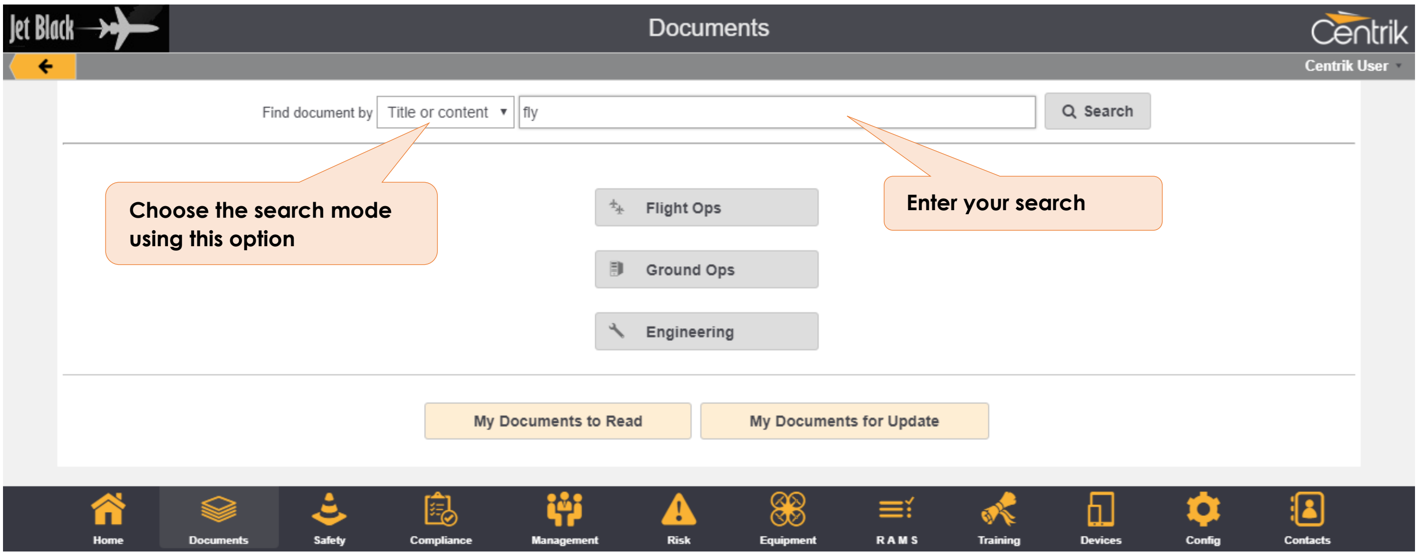


If a link to an older version of a document is used then the viewer is informed that a newer version of the document is available, which can be viewed instantly.

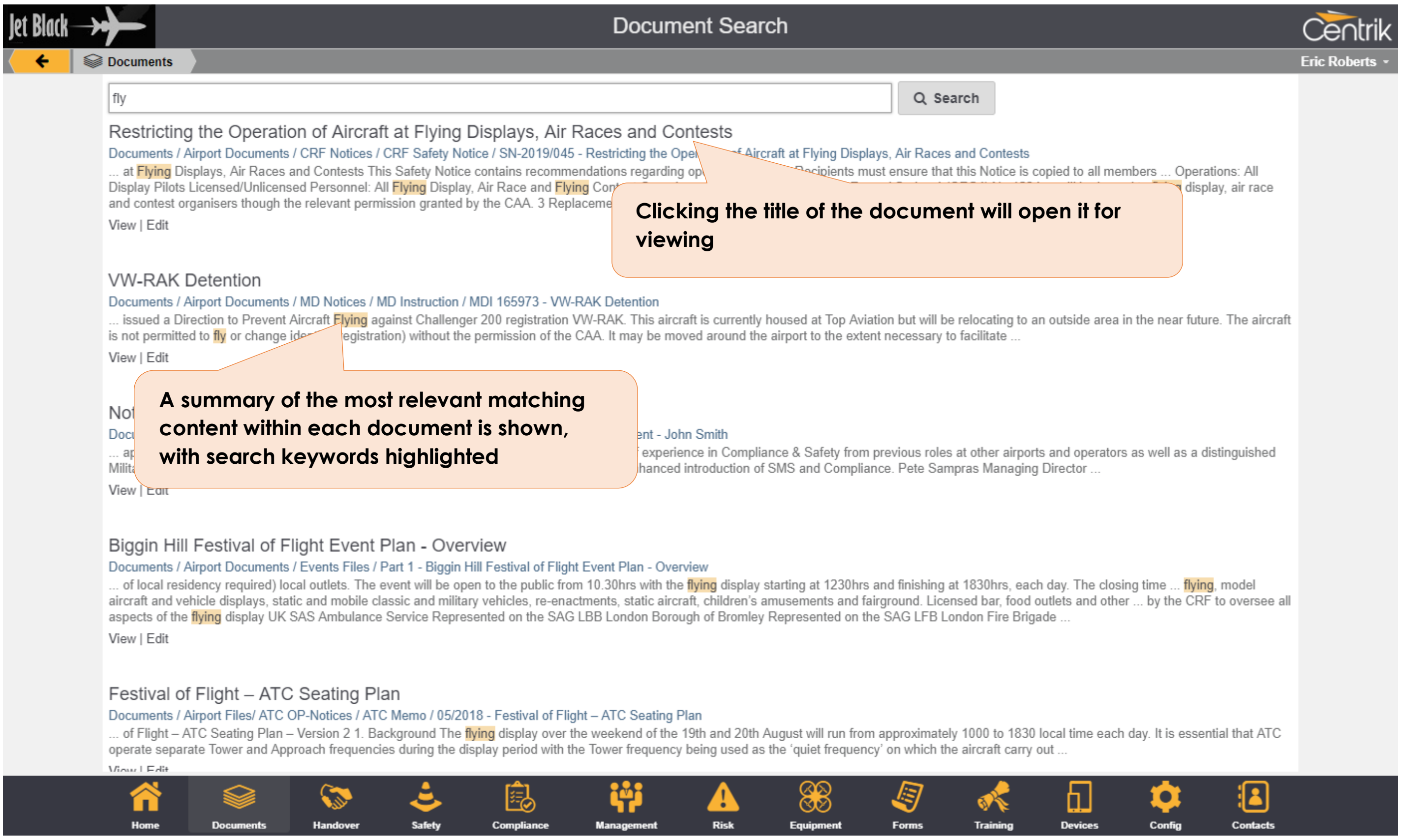


Document Search

Centrik V4.2 improves the ability to search for documents. When you upload a file in the documents module, Centrik will 'read' it's contents and make it available for searching. Once read, documents can be searched from the documents module home page



The above example will look for the word "fly" anywhere in the title or content of a document and will display a maximum of 10 results at a time. Where there are lots of search results there will be links at the bottom of the page which you can click or tap to show more results.



Note that it may take a few minutes after uploading a document for it to become searchable.

Search is designed to work with many document formats, with some exceptions:

- Images cannot be searched, even if they contain text
- Password protected files cannot be searched
- PDF files containing scanned documents cannot be searched

After upgrading to V4.2, Centrik will need time to read your previously uploaded documents. You may therefore not see this option immediately when you first upgrade.

Selecting 'Find document by Title only' will change the behaviour of the search to only look at exact matches on document title - this is identical to the behaviour of Centrik V4.1 and earlier.

Management Module

Management of Change Workflows

Management of Change (MoC) workflows are a specialised form of Workflow designed to guide organisations through the process of effecting significant changes to their business.

Examples of MoC workflows might include:
- Adding a new aircraft to the fleet
- Adding a new building or re-purposing an existing building
- Moving staff from one location to another
- Adopting new policies (such as GDPR)

The key differences between Standard and MoC Workflows are:

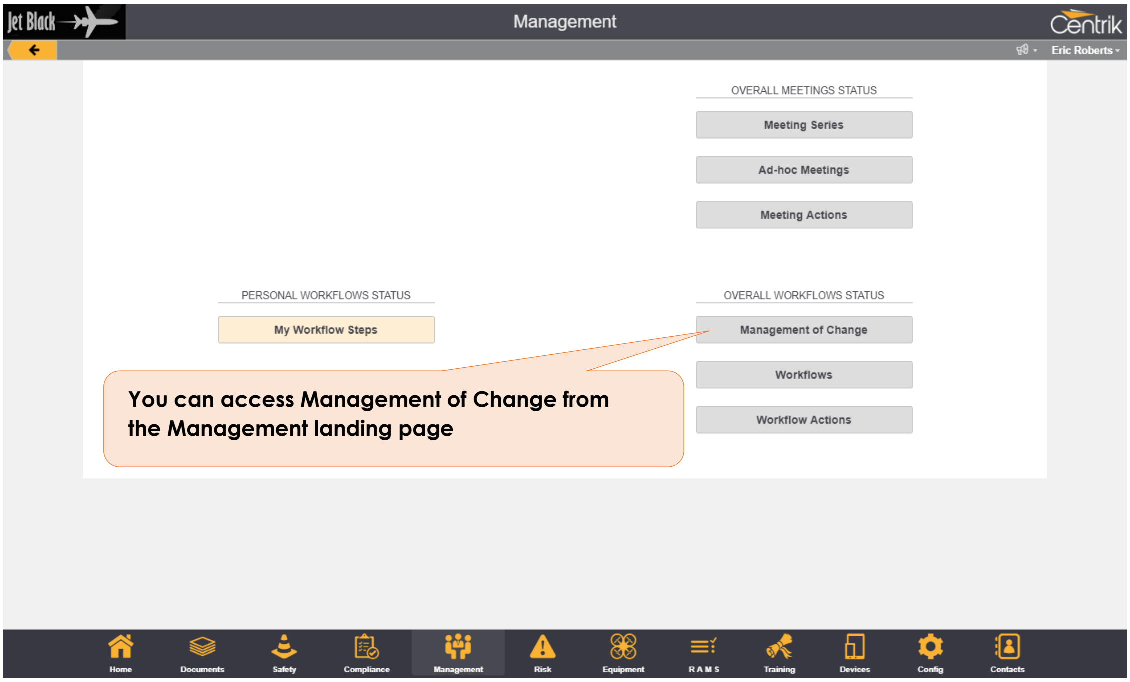
- **MoC Workflows are phased -** Each workflow section is assigned to one of a handful of standard phases. At any point in time, the workflow has a 'Current Phase', implying that the sections in previous phases have been completed.

- **MoC Workflow Phases must be signed off** by the workflow owner (or any authorised manager) before proceeding to the next phase. Only the "current active phase" can be signed off - this ensures that phases are signed off in the correct order.

Management of Change Phasing Options

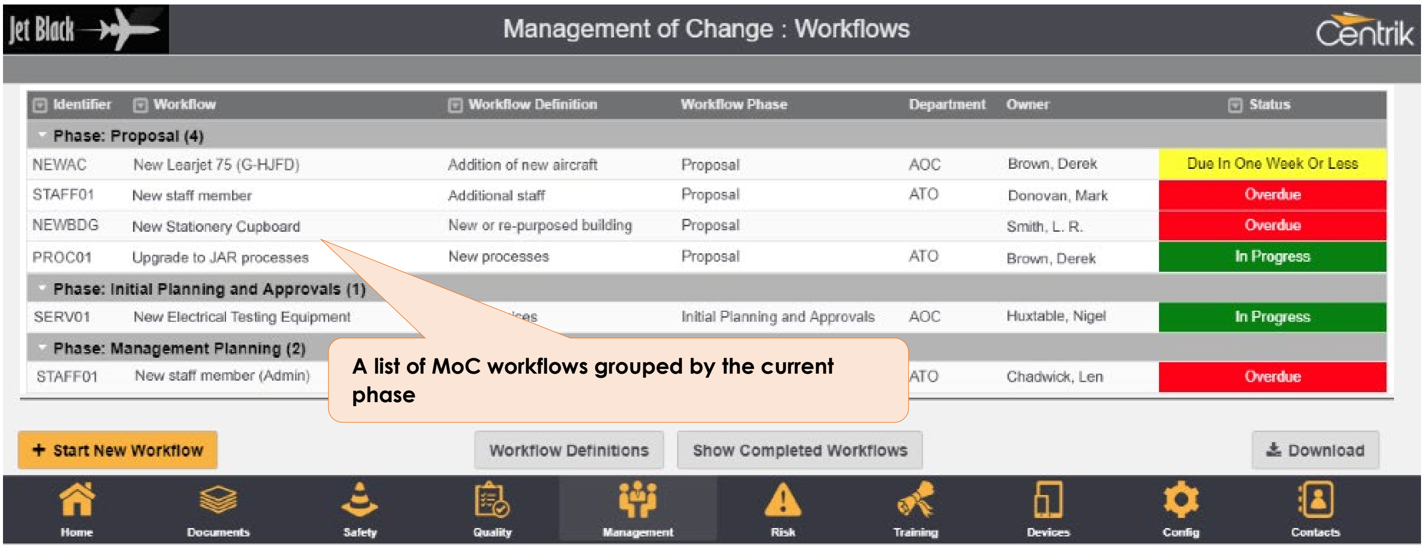
MoC currently implements three phase schemas – **Standard** (7 phase), **Simple** (4 phase) and **Extended** (9 phases).

The phases of the Standard Management of Change model - from 'Initial Proposal' through to 'Distance Review' - are built around industry standard norms and best practice. Should you wish for alternative Phase names, they may be customisable to your requirements via Centrik Support.

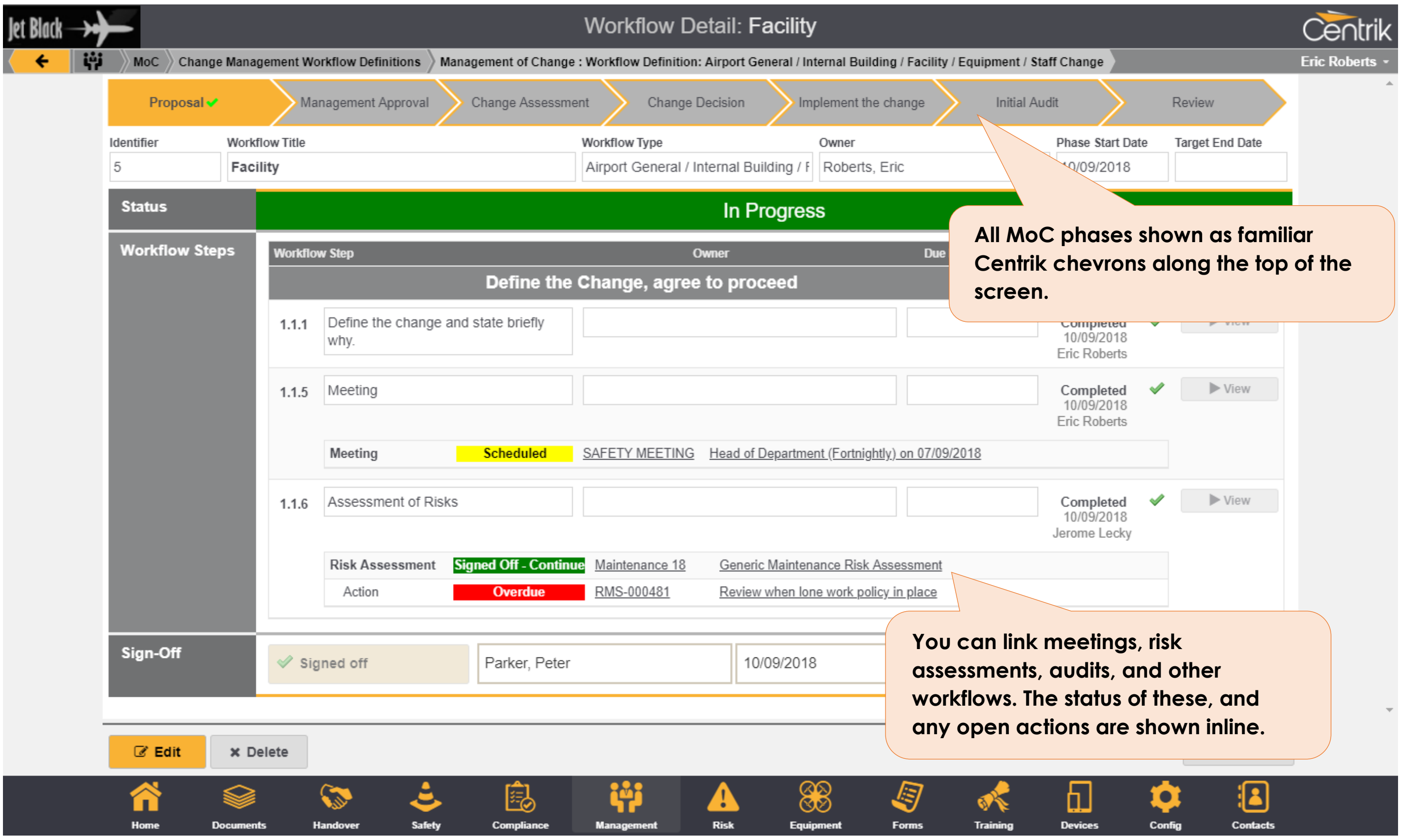


Overview page

The new MoC overview page separates workflows into their currently active phase. MoC workflows therefore progress from Initial Proposal (at the top) down to Distance Review (at the bottom). Coloured status fields provide a rapid overview of the current state of your MoC processes.



Workflow Detail page

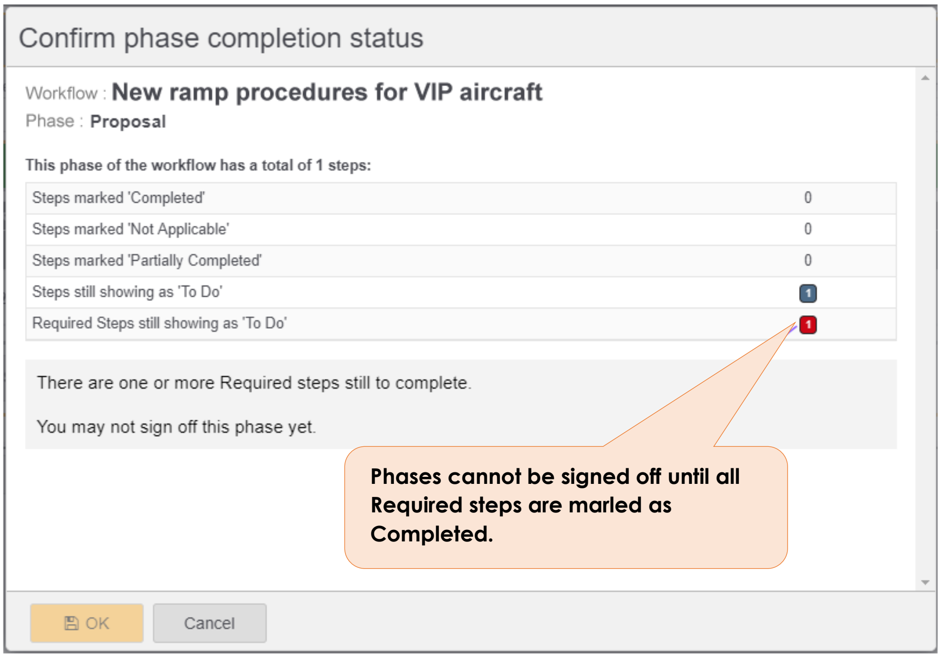


Workflow phases are clearly laid out in standard Centrik style using coloured chevrons at the top of the detail page. Unused phases appear in light grey. Phases beyond the current active phase are inactive until their immediate preceding phase is signed off.

Signing off phases

Phases must be signed off to mark the transition to the next phase. Only the workflow owner and Workflow Managers have sign-off rights, and only the Current Active Phase can be signed off.

Sign-Off Only the current active phase may be signed off.



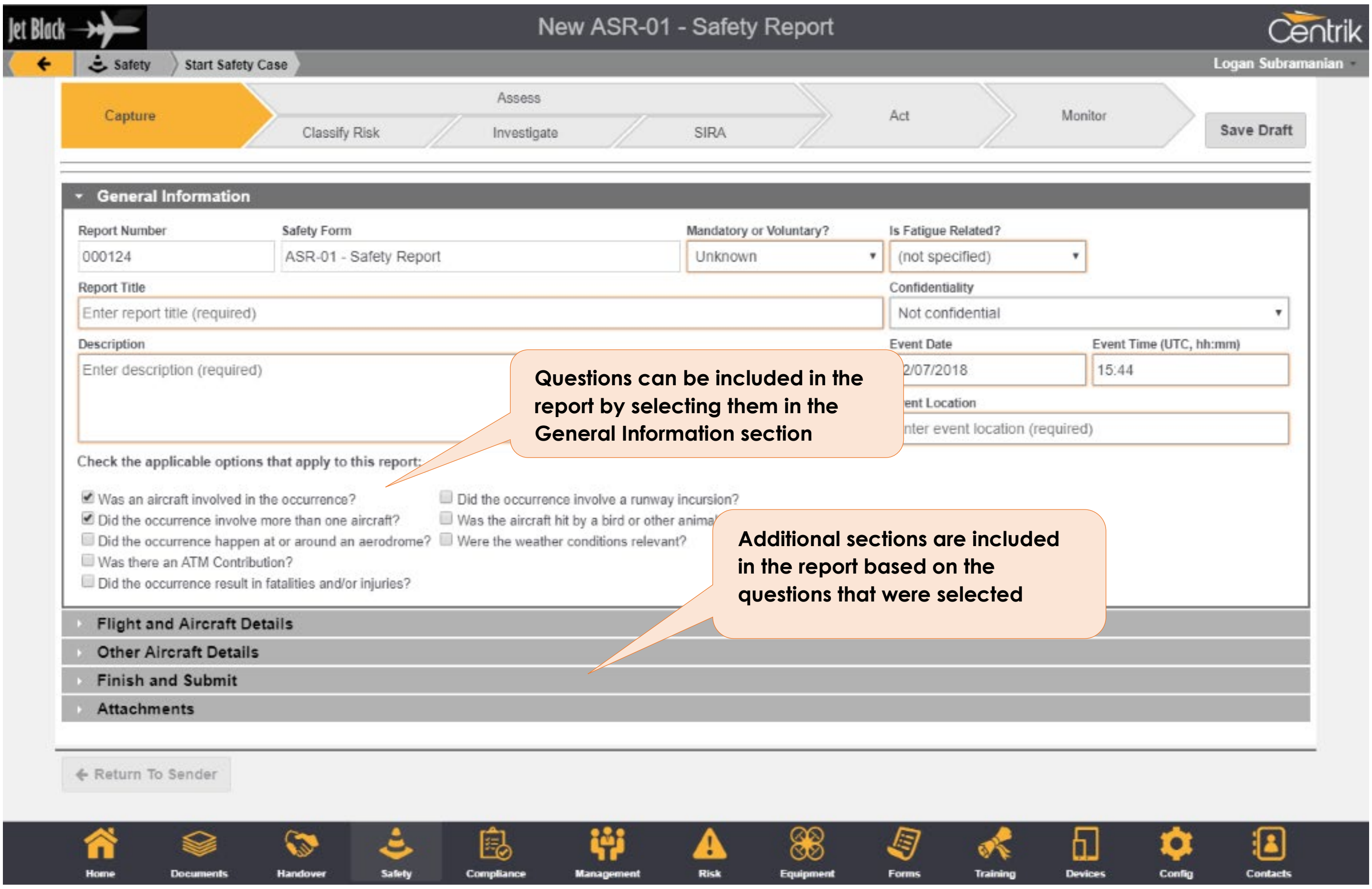
Customising Workflows

Whilst all MoC workflows are initially based on their underlying Workflow Definition, they may be significantly customised - you can Add, Edit or Delete any individual step, and change Step ownership and date criteria.

Safety Module

Optional Form Sections

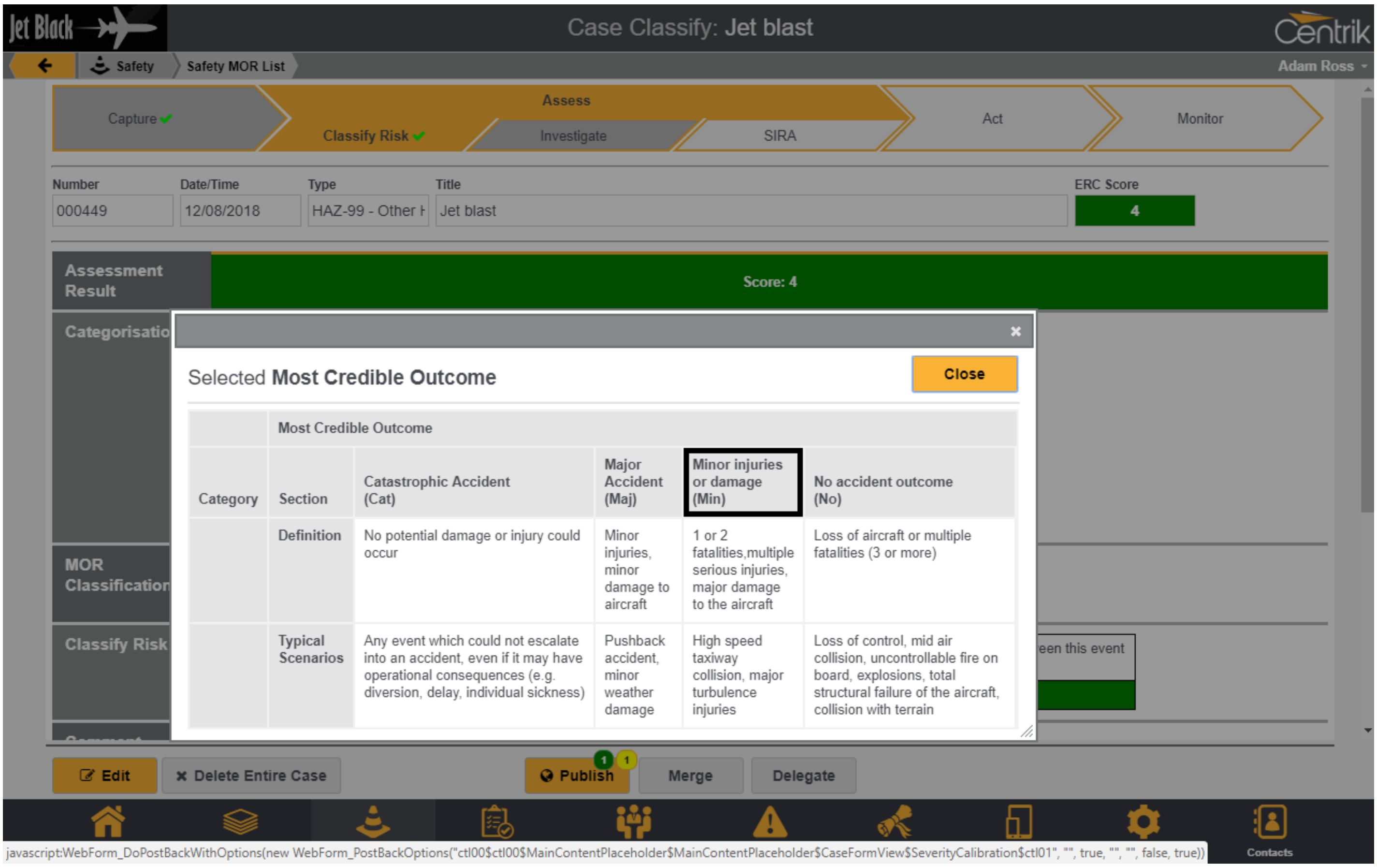
Centrik V4.2 allows for safety reports to be configured with optional sections, where a user can choose the sections that are relevant to their report. For example, a section on 'Runway incursion details' would be included only if a question 'Did the occurrence involve a runway incursion?' was checked. This feature makes for a simpler capture process and makes it easier to ensure the appropriate mandatory fields are provided for every report.



Please contact Centrik Support so that this feature can be enabled and configured based on the safety reports that have been setup.

Alternative ERC View

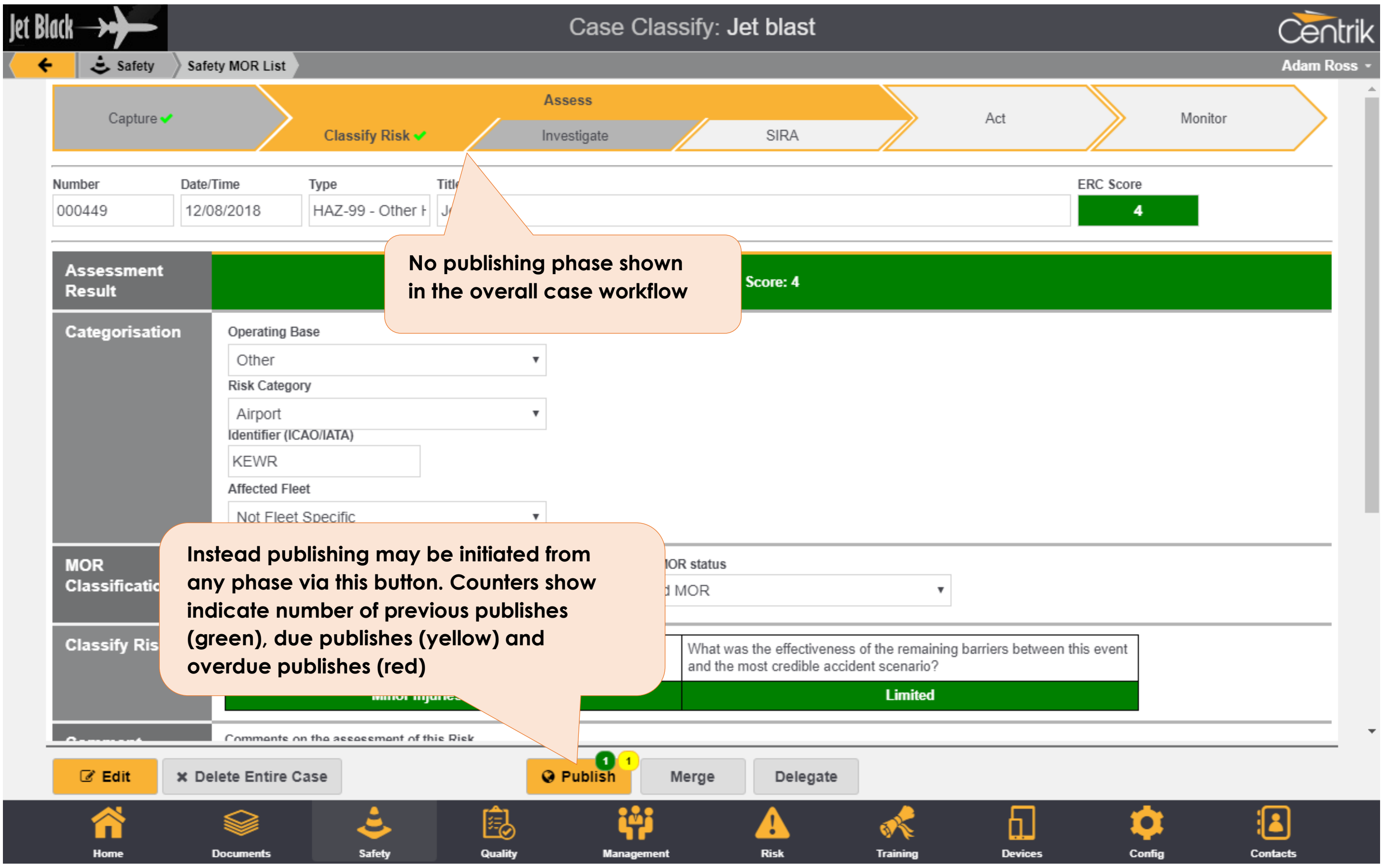
Centrik may now be configured to provide an alternative view for specifying the Event Risk Classification (ERC) for a Safety Case. The new view shows a pop-up including configurable guidance text for each of the options that may be chosen, promoting consistency.



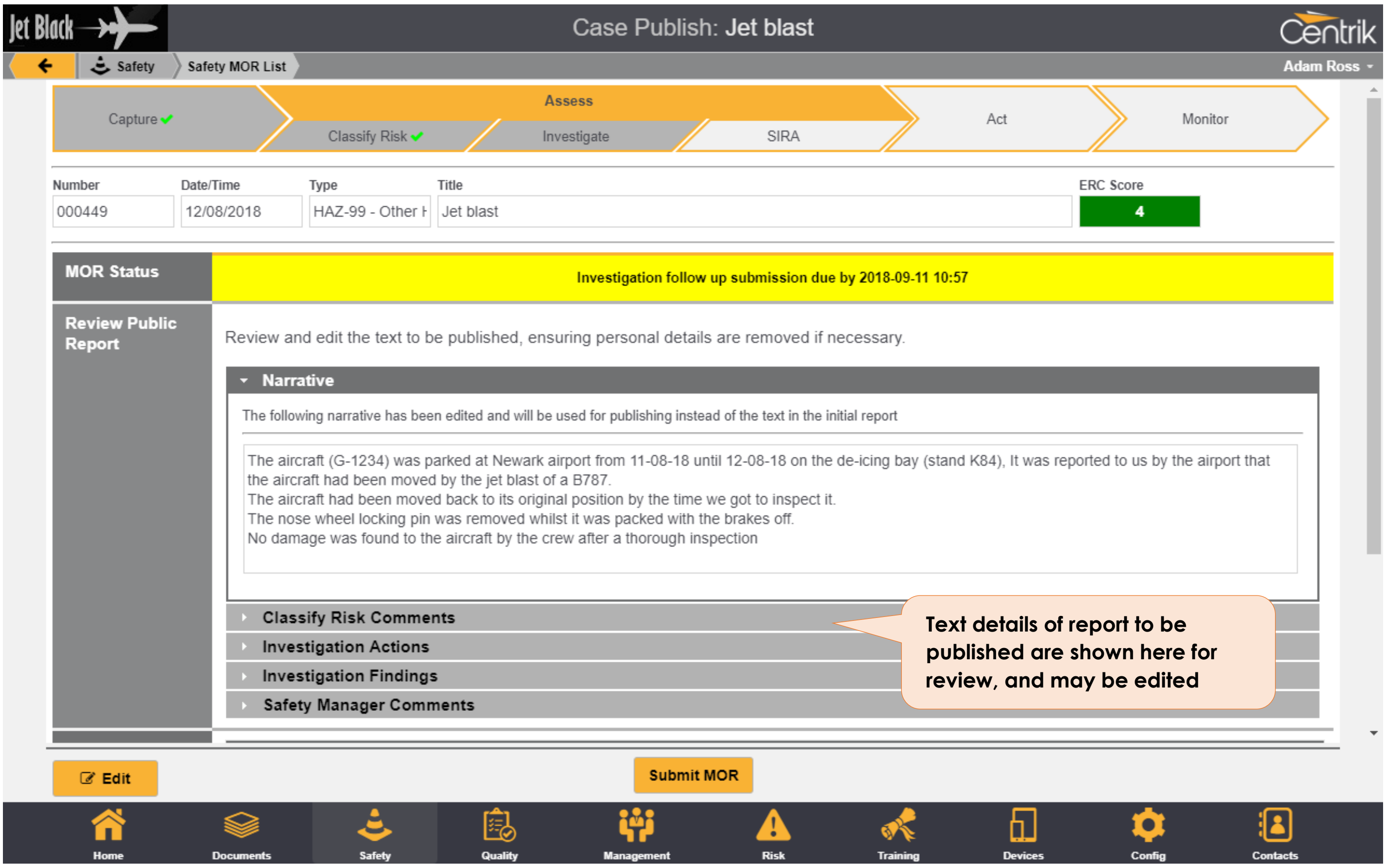
ERC may also now optionally be added to a report form allowing the reporter to submit this information.

Publishing Workflow

Centrik report publishing has been tweaked to separate it from the main safety case workflow. This reflects that fact that publishing can occur at any stage of the case workflow – it is not an isolated stage.



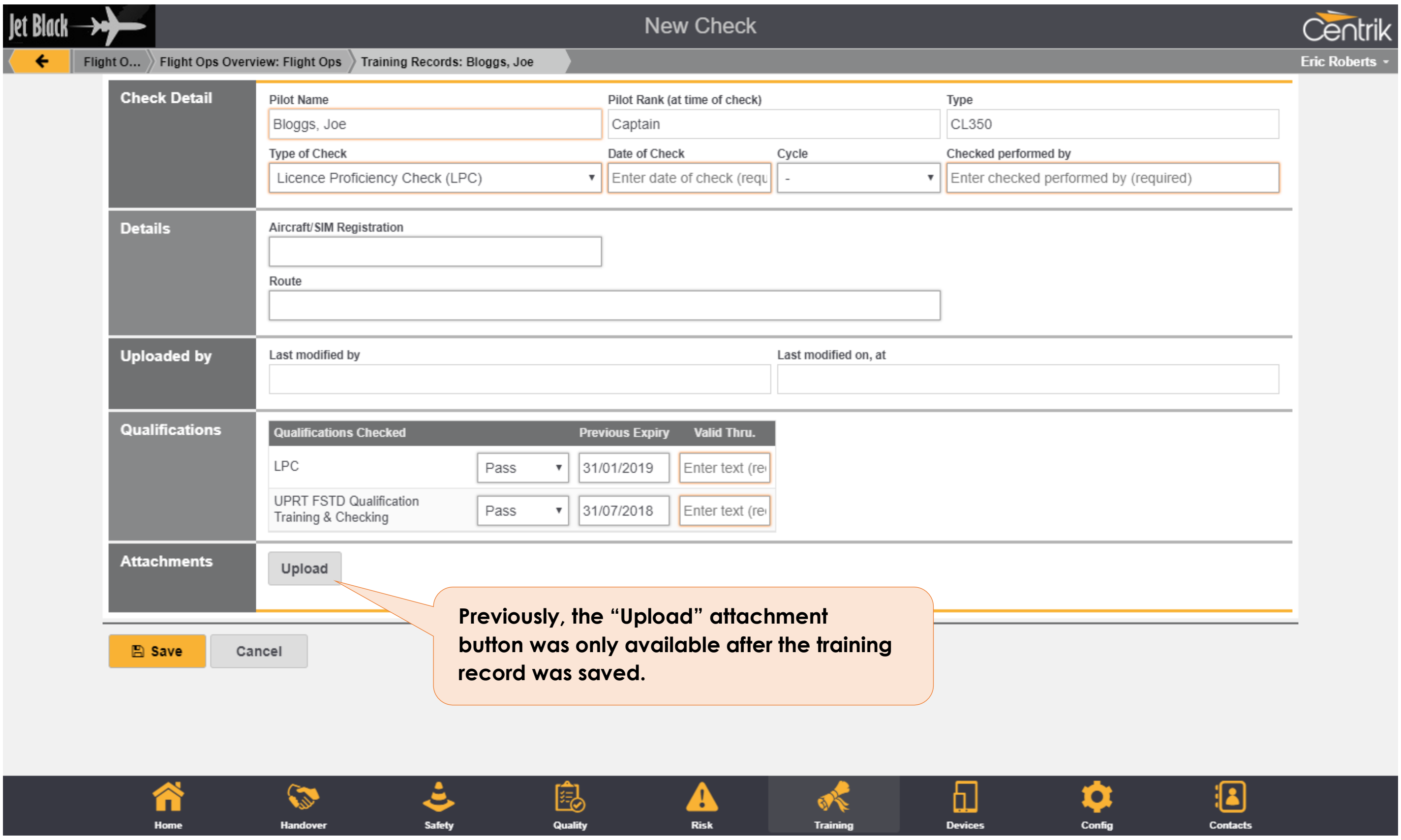
The text details of the case being published are now clearer shown on the publish page, along with the ability to edit the 'public' versions of these fields prior to publishing to ensure on appropriate details are shared, and any personal information is omitted if necessary.

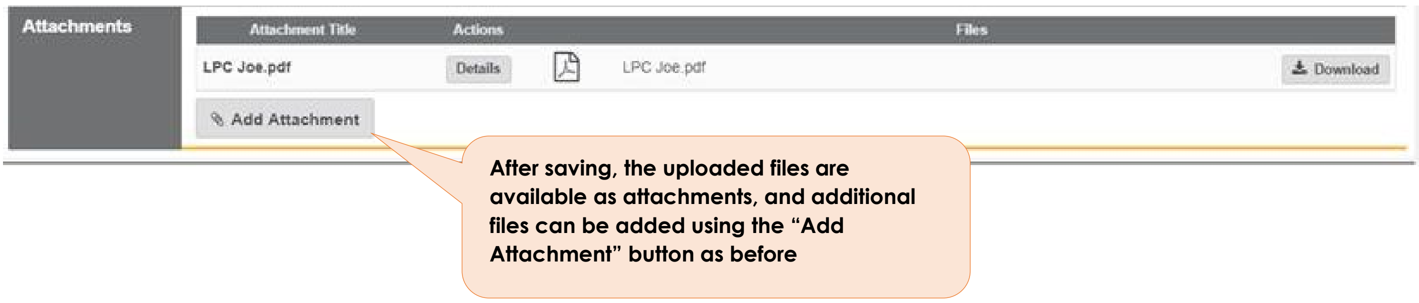


Training Module

Simplified training record updates

We have streamlined the workflow of updating training records. It is now possible to upload the training records and upload the corresponding documents in a single step. This automatically creates the attachments.

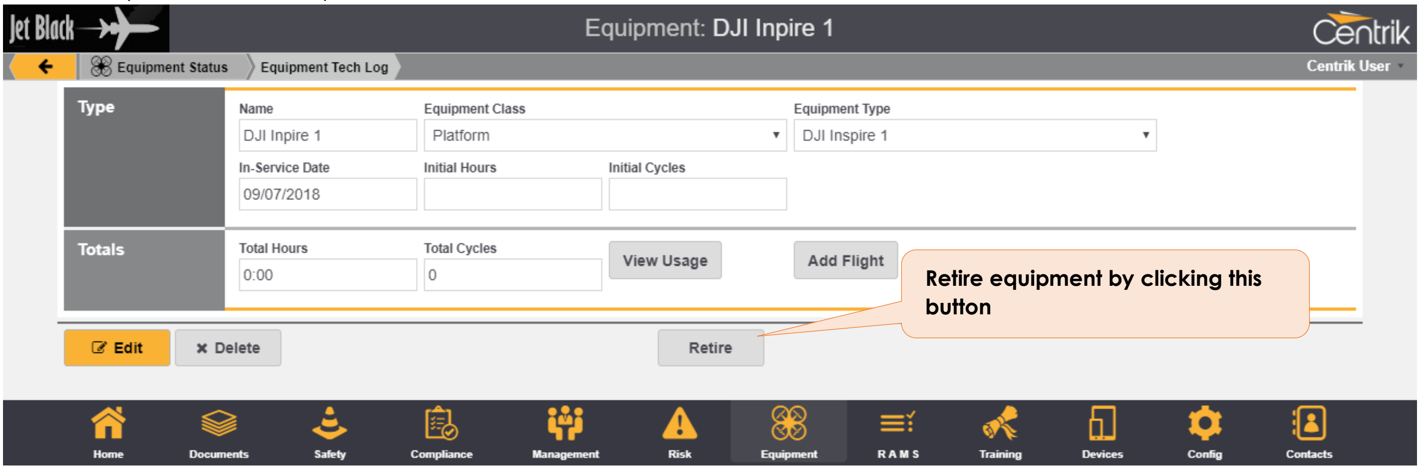




Equipment Module

Retire Status

Centrik V4.2 now allows retiring of equipment. Once retired, equipment cannot be used and no longer needs any checks to be performed.



Once a piece of equipment has been retired:

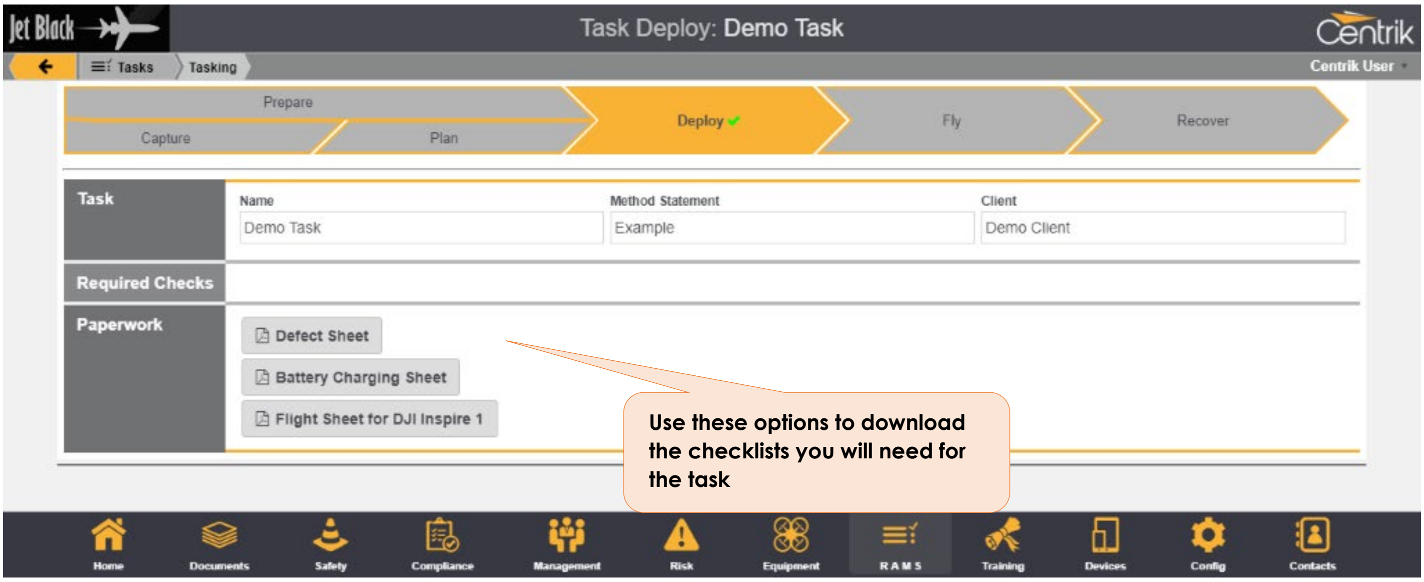
- It will not show in the main Centrik home dashboard
- You can view historic flights, but you cannot add new flights in the equipment module. An exception to this rule is if the equipment has already been assigned to a running task in the tasking module - it is assumed that equipment already on a mission needs to have its usage logged even if it is set to retired in Centrik.
- You can view historic and outstanding defects, but you cannot add new defects. Existing defects can be updated but will not show in reports.
- You can view the history of periodic checks cannot perform new checks.
- You cannot assign this equipment to tasks in the tasking module (but it's existing allocation to tasks will not be removed as per note above).
- You can reinstate the equipment to remove the retire status if required

Tasking Module

Printable Checklists

Centrik V4.2 adds to the tasking module the ability to print checklists for our clients who operate in areas where electronics use is restricted.

Once configured, on qualifying tasks there will be a new "Paperwork" section in the Deploy phase which allows the printing of pre and post flight checklists for the equipment you are taking on a mission.



At Centrik, we encourage our clients to be paperless wherever possible, so this feature is only enabled on request - please contact Centrik Support.

Support

Please do not hesitate to get in contact with the Centrik support team, who will be more than happy to assist you with any queries or issues you may have.

The support team can be reached by the following means:

- Email: Support@Centrik.net
- Telephone: +44(0)1959 543 204
- Helpdesk: Helpdesk.Centrik.net
- Skype: All members of our team have Skype for Business accounts and can add Customers to their contacts to enable Skype contact, particularly for when screen sharing may be needed or where no telephone is available.