

# Easy, efficient workflow automation for transforming risk management



## TAP Workflow Automation

TAP is a Cloud-based solution for automating any mundane process. So your team can focus on doing the work, not wrestling with workflows. Using simple drag-and-drop design tools, TAP lets you automate repetitive manual workflows, organize and structure tasks and activities, auto-generate content and more. TAP integrates seamlessly with existing infrastructures, is customizable to your exact needs, reduces errors, and drives ROI that's immediate – and often upwards of 400%.

Plus, TAP pairs other solutions in our Enterprise Compliance Suite, such as PolicyHub and DataStore. Now you can extend compliance best practices across workflows everywhere in your organization.

**“The Customer Success team is amazing, suggesting industry best practices during initial setup, providing top-notch training after setup completed, and supplying excellent support after go-live.**

CAPTERRA REVIEW

## Platform Benefits

**Immediate ROI** Cloud-based TAP provides immediate access to the entire set of tools needed for workflow automation and process transformation.

**Lower TCO** Reduce total costs through managed services, no infrastructure requirements, risk reduction and predictable pricing.

**Ease of Use** Design and publish workflows for any compliance-related process; no coding, IT or developer involvement necessary.

**Centralization** Global access to centralized documents, workflow statuses, and analytics

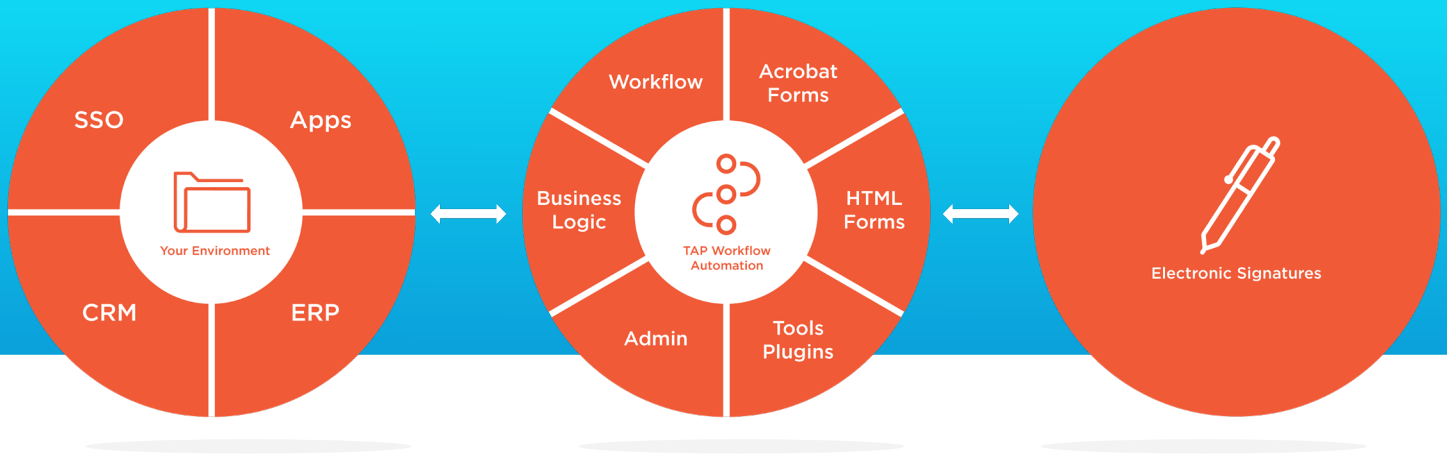
**Reusable Apps** Turn your compliance-related processes into reusable apps for use across multiple functions and departments.

**Flexibility & Scalability** Respond fast to changing needs with an agile methodology enabling iterative design and implementation.

**Renowned Customer Service** Work with a dedicated account manager who understands your specific objectives and how TAP can fit your operations ecosystem.

**Better Compliance** Track and monitor every transaction across every workflow, with audit trails that live forever.

**Reporting & Analytics** Access reports in a variety of formats, providing visibility and transparency across your whole organization.



## Platform Features

### Workflow Automation

- No coding, no development necessary
- Cloud-based, cross-browser, cross-platform
- Accessible from any device, anytime
- Drag-and-drop UI for designing forms and workflows
- Can build simple or complex logic
- Custom notifications
- Custom form styles
- Integrate any data source

### Document Management

- Build dynamic document templates
- Auto-generate documents
- Manage document clauses with content sources
- Document integration with workflow logic
- Online redlining
- Version control
- Centralized document and contract repository

### Multiple Integration Points

- Integrates with major software applications
- Configure custom integrations with point-and-click
- Advanced REST API
- Built-in eSign integrations
- Integrates with TeamConnect ELM

### Security

- Industry leading certifications
- HIPAA
- SOC2
- PCI
- PII
- ISO27001



## Tools of Transformation

TAP lets you free your workplace of the inefficiency and errors that plague manual workflows, with a full set of tools for optimizing, accelerating and transforming your culture and competitiveness.

**Easily-Created Forms** Create any workflow automation form in minutes, with no programming required:

- Simple drag-and-drop online form builder
- Multiple form field types
- Custom styles
- Build conditional logic
- Easy data integration
- Define user access and permissions
- Multilingual support lets form users pick form language

**Quick-to-Build Workflows** Quickly build workflows that save time and money, and reduce errors:

- Simple drag-and-drop online form builder
- Multiple form field types
- Custom styles
- Build conditional logic
- Easy data integration
- Define user access and permissions
- Multilingual support lets form users pick form language



**Seamless Data Integration** TAP flawlessly integrates data from across multiple platforms:

- Create or upload data tables in Excel
- Manage relationships between datafields
- Manage data in forms and workflows to centralize transactions
- Integrate across internal and external systems
- Build conditional logic

**Ample Analytics** With TAP, every transaction is tracked and managed:

- Transparency across any business process
- Custom dashboards with drill-down capability
- Real-time data updates
- Reports delivered to your inbox
- Multiple chart types, reporting interfaces, and custom views
- Data export for offline reviews

**Secure Signatures** End-to-end integration into workflows via e-signature providers Adobe Sign and DocuSign:

- Add eSignatures to any workflow stage
- Initiate eSign actions and view signature status
- Manage multiple signers
- Sign documents anywhere, anytime

**Close-at-Hand Customer Service** Users praise our customer support as being a big part of why they rely on Mitratesch:

- A dedicated account manager focuses on your risk management objectives
- Close collaboration:: customizes TAP to your needs, not vice-versa

## GRC Use Cases

Just some of the use cases where TAP Workflow Automation adds speed, effectiveness, and compliance to risk management processes.

### CCPA Data Deletion Requests

Create a public-facing workflow that seamlessly gathers information for a customer through Accounting, HR, and/or Finance. Ensure ease-of-use for the end user while keeping everything aligned and audited internally.

### Conflict of Interest

Effectively address and resolve conflict-of-interest issues that need the ongoing attention of multiple stakeholders in the organization.

### Regular Compliance Affirmation

Enable stakeholders and policy managers to affirm that key policies and procedures are being followed and correctly implemented.

### Data Privacy

Automate consent procedures by which employees agree to the retention of their personal data, while giving employees the ability to find out what personal data is being processed, why it is being processed and where it is being held.

### Entertainment Disclosures & Exceptions

Provide a simple, convenient way for executives and staff to report on gifting and entertainment activities in order to mitigate potential non-compliance risk and cultivate a healthy, open culture.

### Policy Exceptions

Simply and effectively track and preserve all communications and documents around policy exceptions in order to maintain compliance and avoid risk.

### Legal/Policy Questions

Log, preserve and address employee inquiries and legal responses around the implementation of new policies and procedures in order to facilitate audits or regulatory review.