Customer Internal Team - Workshop Reference Guide

Data Ingestion

Use this guide to equip internal teams to determine best ways to bring all GRC data into their Trustero account.

Why this workshop guide exists

Help customers understand the available ways to bring data into Trustero:

- decide which path fits each data type,
- and avoid source-of-truth confusion during implementation.

Trustero adapts to the customer's GRC program design and workflows.
The goal is:

- not to force every customer into one operating model.
- to help them decide which systems:
  - should own which data,
  - how evidence should flow into Trustero,
  - and where users should perform ongoing work.

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Part 1:

Customer Workshop Guide

1. Workshop objective

By the end of the workshop, the internal teams should be able to answer four practical questions:

- What data do we want to bring into Trustero?
- Which source system owns each data type?
- Which receptor category should we use for each workflow?
- Where will evidence, policies, controls, and test procedures be maintained after go-live?

2. Recommended audience

Invite the people who understand both the GRC program and the systems where the work actually happens:

- GRC program owner
- Control owners or control operations lead
- IT / Security operations representative
- Audit readiness or internal audit lead
- System administrators for Archer, Anecdotes, Jira, ServiceNow, SharePoint, Google Drive, Confluence, or other connected tools
- Trustero implementation lead / customer success lead

3. Recommended pre-work

Gather and document the following:

- A list of systems currently used to manage policies, controls, evidence, issues, and audit requests
- Current source-of-truth expectations for each system
- A small sample of representative controls and evidence requests
- Known differences across business units, child accounts, regions, product lines, or frameworks
- Any audit-driven requirements for retaining evidence, tickets, approvals, or test procedure history

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Part 2.a:

Workshop Agenda

Align on operating model

Start by grounding the conversation in the customer's current workflow.

Discussion prompts

- Where are policies maintained today?
- Where are controls maintained today?
- Where are evidence artifacts stored or generated?
- Who provides evidence when it cannot be automated?
- Do all business units use the same test procedures, or do they vary by unit, product line, framework, or child account?
- Which systems are authoritative today, and which are just used for tracking?

Facilitator framing

Trustero can bring in data from multiple systems, but the implementation works best when the customer decides which system owns each type of data before sync behavior is configured.

Data ingestion options

Explain receptor categories

Trustero uses receptors as the umbrella term for integrations that bring data into the product or support evidence-related workflows.

There are three receptor categories to keep consistent throughout customer conversations:

1. Evidence receptor
2. Workflow receptor
3. Document management receptor

Map source systems to receptor categories

Use the customer's current systems and walk through where each one fits.

Customer need	Best-fit receptor category	Examples	Outcome in Trustero
Pull operational evidence from connected systems	Evidence receptor	AWS, Jira, Confluence, Slack, Miradore, TriNet, Okta, GitHub, GitLab, Google Workspace, CrowdStrike, Snyk	Evidence artifacts can be scanned, indexed, and associated with controls
Request evidence from people who may not use Trustero	Workflow receptor	Jira Workflow, ServiceNow Workflow	Users can create and track evidence request tasks in external workflow systems
Pull documents for policies or control support	Document management receptor	Confluence, Google Drive, SharePoint	Documents can be synced and used as policy documents or supporting control evidence
Add one-off or audit-requested artifacts	Manual evidence upload	Add Evidence in Trustero	Evidence lands in the Evidence Index and may be linked to one or more controls

GRC platforms integration guidance

Shared capability

Archer and Anecdotes integrations can support bringing GRC program data into Trustero, including:

- Policies
- Controls
- Evidence
- Customer-customized program data, depending on the integration configuration and customer design

The key implementation decision is not just ***what can be*** imported. The key decision is ***what should remain*** authoritative after import.

Anecdotes integration guidance

Recommended operating model:

- Bring policies, controls, and evidence into Trustero as configured.
- Write and modify test procedures directly in Trustero.
- Treat Trustero as the working source of truth for test procedure design unless the customer has a separate documented reason to maintain them elsewhere.

Important note: Because Anecdotes does not import test procedures into Trustero, this is a good opportunity to shape test procedures inside Trustero based on how each control is actually tested. This is especially useful when procedures vary by child account, business unit, product line, or framework scope.

Archer integration guidance

Recommended operating model:

- Decide up front whether Archer or Trustero will be authoritative for test procedures.
- If Archer remains the source of truth, make sure the final approved copy of any test procedure is saved in Archer.
- If the Trustero Test Procedure Refinement tool is used, do not leave the final copy only in Trustero when Archer is configured to import and overwrite test procedures.
- If the customer wants Trustero to become the source of truth for test procedures, confirm whether Archer sync behavior needs to be adjusted before customer teams begin editing procedures in Trustero.

Important note: Archer can bring test procedures into Trustero, which is powerful but also means source-of-truth decisions matter. If Archer remains authoritative, test procedure changes made in Trustero should be finalized back in Archer so they are not overwritten or lost during future imports.

Part 3.a:

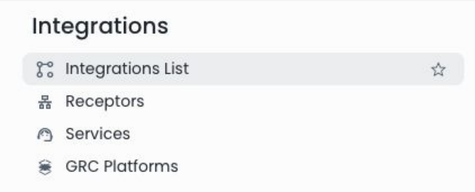
Evidence receptor overview

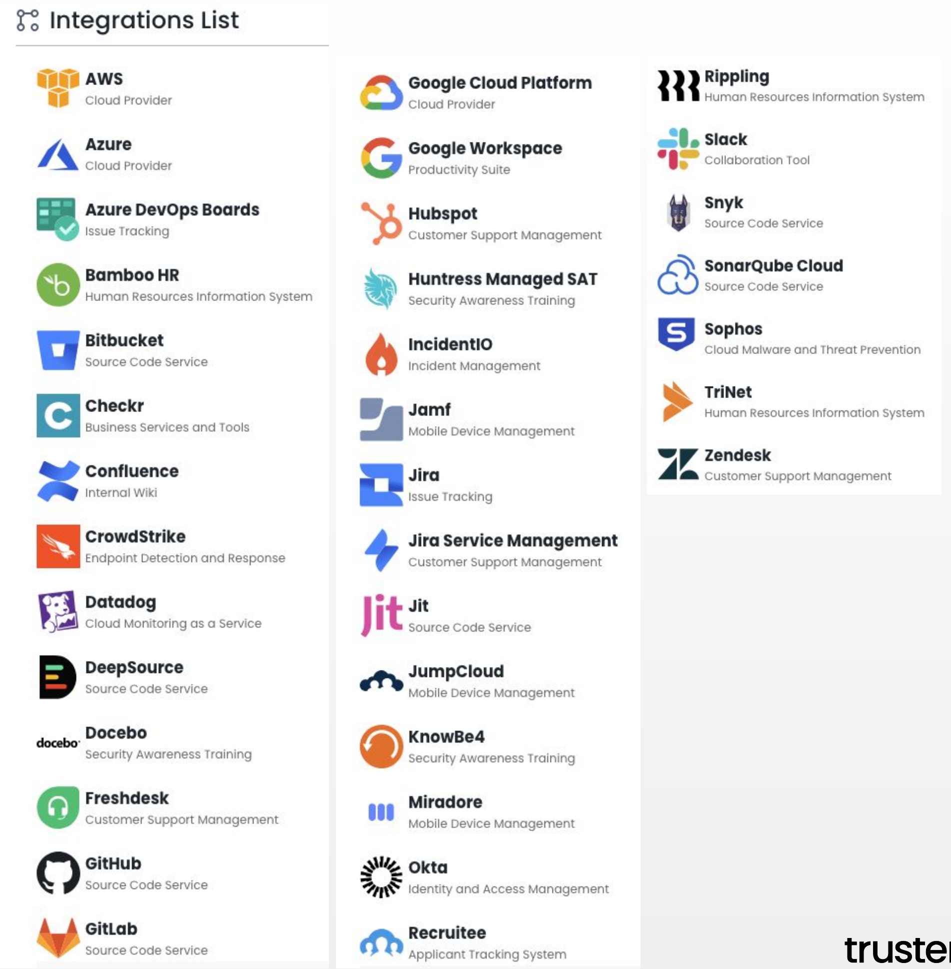
Purpose: Evidence receptors bring evidence from connected operational systems into Trustero.

Evidence receptors are useful when evidence can be collected directly from a system rather than manually requested from a person.

Evidence receptors help Trustero automatically scan connected systems for relevant compliance evidence. Once evidence is collected, it can appear in the Evidence Index and may be linked to controls or remain unlinked until reviewed.

Examples shown in the receptor list include: ***Note:*** For complete list go-to “Integrations List” under the “Big Menu:”





Part 3.b:

Workflow management receptor overview

Purpose: Create and track evidence request tasks in an external workflow system, such as Jira or ServiceNow.

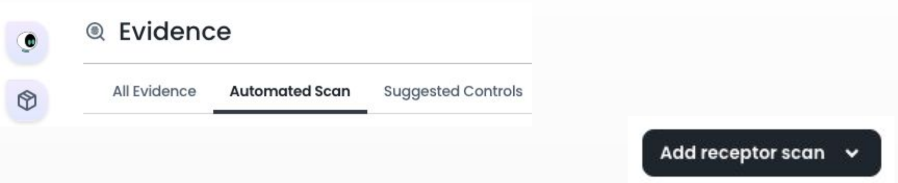
Workflow receptor options currently shown:

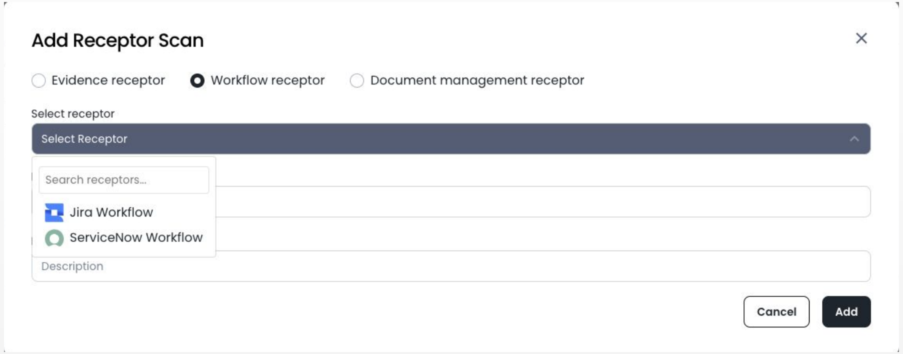
- Jira Workflow
- ServiceNow Workflow

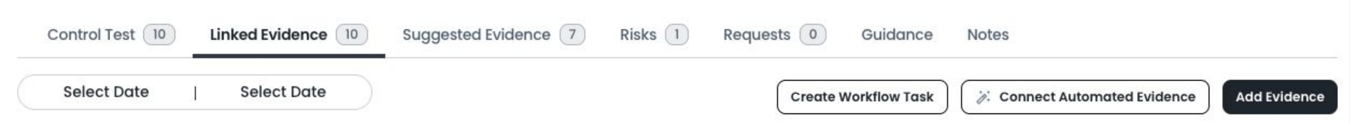
Best used when:

- Evidence needs to be requested from SMEs outside the GRC team
- The organization does not want to give every evidence provider access to Trustero
- A department owner needs to provide supporting artifacts that cannot be automated
- Internal or external audit asks for additional evidence beyond the recurring evidence set
- The customer already manages operational work in Jira, ServiceNow, or another workflow system

Workflow management receptors are best used when evidence does not already exist in a connected evidence source, cannot be automated, or needs to be requested from a person or team. Instead of requiring every SME to work inside Trustero, the GRC team can create a task in the customer's existing workflow tool and keep the request tied back to the Trustero control.







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Part 3.c:

Document management receptor overview

Purpose: Document management receptors sync documents into Trustero for policy management or control support.

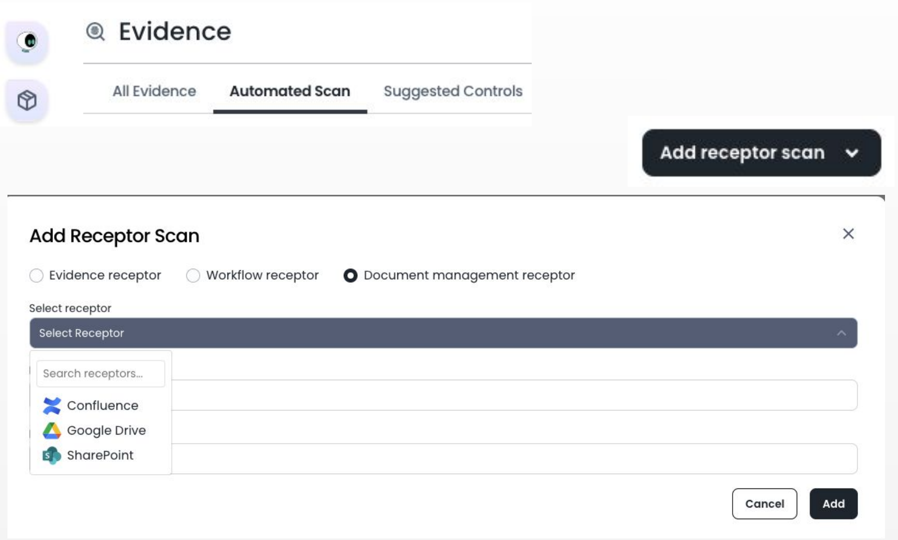
Current document management receptor options shown include:

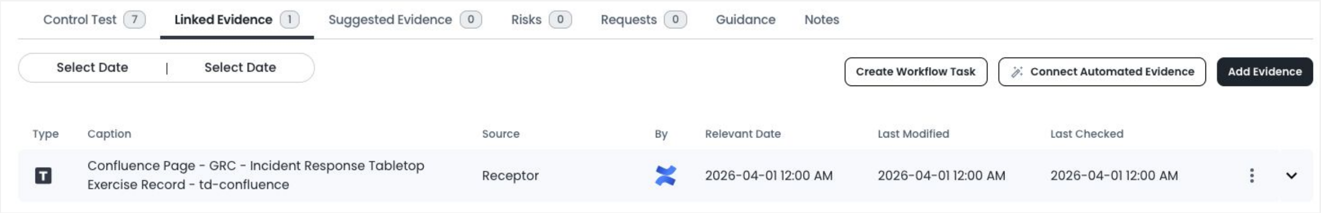
- Confluence
- Google Drive
- SharePoint

Best used when:

- Policies are maintained in a document repository
- Procedures, diagrams, screenshots, exports, or supporting artifacts are stored in a shared document location
- The customer wants evidence or policy documents to be available in Trustero without requiring manual upload each time

Document management receptors are useful when the customer already has a document library that supports the compliance program. Trustero can use those documents as policy documents or as evidence attached to controls, depending on how the customer wants to design the workflow.





Part 4:

Where evidence lands in Trustero

Evidence collected through receptors or added manually can be viewed in the Evidence index page.

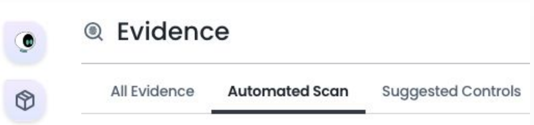
The Evidence Index is the central place to see:

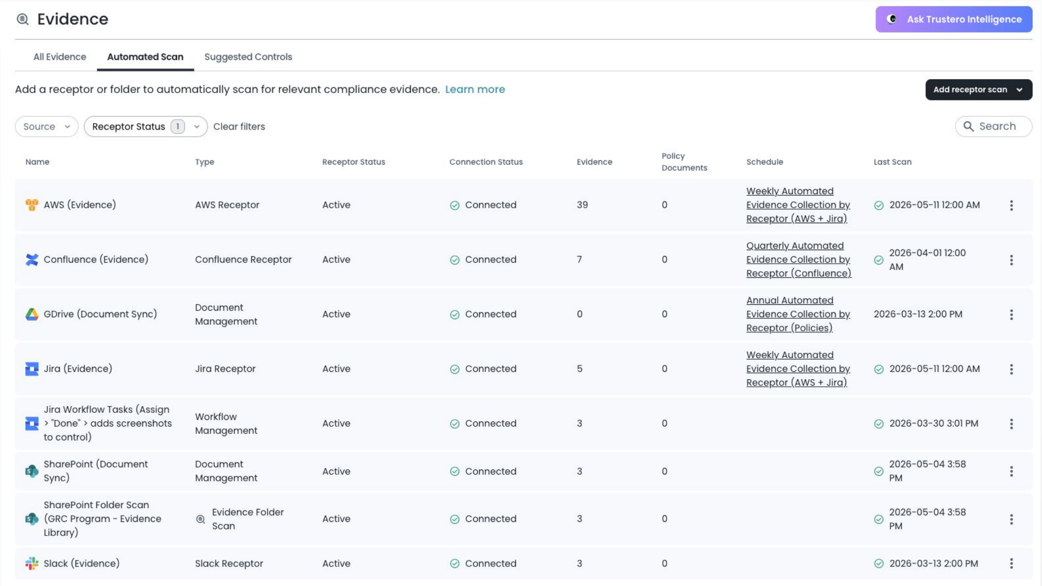
- All uploaded or collected evidence
- Evidence source
- Whether evidence is linked to controls
- Relevant date
- Last modified date
- Last checked date
- Evidence that is attached to a control and evidence that is not yet attached

The Evidence page also provides access to:

- All Evidence
- Automated Scan
- Suggested Controls
- Add Evidence
- Add receptor scan

The Evidence Index is the easiest place to understand what Trustero has collected, what is already tied to controls, and what may still need review or mapping.





Name	Type	Receptor Status	Connection Status	Evidence	Policy Documents	Schedule	Last Scan
AWS (Evidence)	AWS Receptor	Active	Connected	39	0	Weekly Automated Evidence Collection by Receptor (AWS + Jira)	2026-05-11 12:00 AM
Confluence (Evidence)	Confluence Receptor	Active	Connected	7	0	Quarterly Automated Evidence Collection by Receptor (Confluence)	2026-04-01 12:00 AM
GDrive (Document Sync)	Document Management	Active	Connected	0	0	Annual Automated Evidence Collection by Receptor (Policies)	2026-03-13 2:00 PM
Jira (Evidence)	Jira Receptor	Active	Connected	5	0	Weekly Automated Evidence Collection by Receptor (AWS + Jira)	2026-05-11 12:00 AM
Jira Workflow Tasks (Assign > "Done" > adds screenshots to control)	Workflow Management	Active	Connected	3	0		2026-03-30 3:01 PM
SharePoint (Document Sync)	Document Management	Active	Connected	3	0		2026-05-04 3:58 PM
SharePoint Folder Scan (GRC Program - Evidence Library)	Evidence Folder Scan	Active	Connected	3	0		2026-05-04 3:58 PM
Slack (Evidence)	Slack Receptor	Active	Connected	3	0		2026-03-13 2:00 PM

Recommended source-of-truth decision model

Use this decision model before configuring the integration.

Data type	Recommended decision question	Common recommendation	Nuance
Policies	Where are policies approved and maintained today?	Keep the approved policy repository authoritative unless the customer is intentionally moving policy management into Trustero	Document management receptors can help sync policy documents from SharePoint, Google Drive, or Confluence
Controls	Where is the control library maintained and governed?	Match the customer's GRC operating model	Archer and Anecdotes customers may already maintain controls in their GRC platform
Evidence	Where is evidence generated or stored?	Pull evidence from source systems when possible; manually upload or request when needed	Evidence may be linked to controls or remain unlinked until reviewed
Test procedures	Do procedures vary by unit, product line, child account, or framework?	Trustero is recommended as the working source of truth for test procedure design	Archer can import and override test procedures, so Archer customers need an explicit source-of-truth decision
Evidence Requests	Where do SMEs already manage tasks?	Use Jira or ServiceNow workflow receptors when evidence requests need to be assigned and tracked outside Trustero	Especially useful for mid-enterprise organizations that do not want all SMEs in Trustero

Customer decision worksheet

Use this worksheet to get a jump start.

Decision area	Team answer	Trustero recommendation?	Follow-up owner
Primary GRC platform			
Control source of truth			
Test procedure source of truth			
Evidence source systems			
Document repositories			
Workflow/task system			
Child account or business unit variation			
Evidence that can be automated			
Evidence that must be requested manually			
Systems requiring admin access or setup			
Known sync or override risks			

Recommended workshop close

End the workshop with a confirmed operating model.

Closeout questions:

1. Which receptors should be configured first?
2. Which source systems are authoritative for policies, controls, evidence, and test procedures?
3. Are there any systems that can overwrite Trustero content?
4. Which evidence requests should be automated versus workflow-driven?
5. Who owns the next configuration step for each receptor?
6. What sample controls should be used to validate the end-to-end flow?