Ongoing Tenant Management

Risk Assess Guide
July 2020
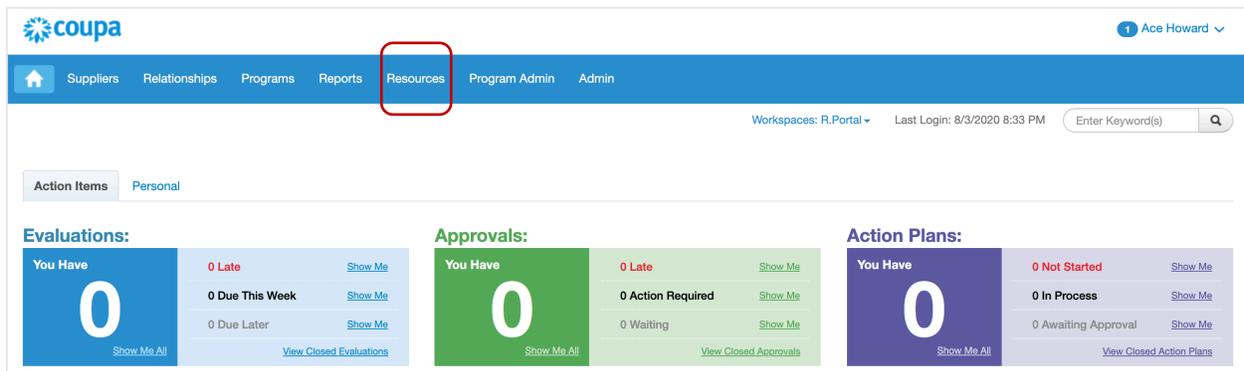
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Introduction

Congratulations on your recently completed Risk Assess implementation! This document will provide you with guidance on the day-to-day administration of the application – This includes the customer's responsibilities as well as the support services provided by Coupa.

How to Use this Document

This document is intended to be used along with the Risk Assess Reference Guide, Risk Assess Components Reference Guide, Email Notification Reference Guide, Risk Assess Customer Support Policy, Suite Spot Videos, Release Notes, and Help section of the application to help our customers understand how to accomplish routine management tasks associated with the application.

The Guides and Release Notes mentioned above are available in the Resources section of Risk Assess.

Help is available on every page of the application in the upper right hand corner of the screen.

Downloading the Guides from Resources

Guides are located within the Resources section. After clicking the Resources tab, scroll down and click "Risk Assess Resources."

Next, Click "Reference Guides." All reference guides are located here. They are updated periodically.

Suite Spot Videos and Release Notes Resources

Suite Spot videos and Release notes are located within the Resources section. After clicking the Resources Tab, click "Risk Assess Resources Forums."

Next, click "Risk Assess Suite Spot Webinars." All suite spot videos are located here. This section is updated periodically with new suite spot videos. Release Notes are available under the "Risk Assess Release Notes" link. These release notes contain a link to the Coupa Success Portal.

Day-to-Day Administration

General day-to-day administration of the Risk Assess application is the responsibility of the customer. Coupa recommends having a back-up resource trained in the event your primary system administrator is unavailable.

Risk Assess System Administrator Description

While Risk Assess is an application with advanced features and functionality, it does not need to rely on IT resources for day to day administration. An individual with a business analyst skillset along with the proficiencies listed below should be capable of managing Risk Assess on a regular basis.

- A basic foundation in information technologies and/or enterprise software administration, operation, or implementations
- Familiarity with web applications: SaaS, browsers, XML, HTML, SQL
- A polished phone presence and excellent verbal and written communications skills
- Demonstrated skills in researching and resolving technical and application issues with internal clients at all levels
- Basic understand of the stages of the software development lifecycle
- Basic understanding of the concept of RACI modeling – assigning appropriate roles, responsibilities, and access levels to end users and system administrators – *a plus*
- Relational data modeling – *a plus*

What Are You (the Customer) Responsible For?

The customer is responsible for performing the activities mentioned in this section of the document. Your Risk Assess Administrator(s) is typically responsible for performing these activities.

Level One (1) Support: The customer will be responsible for providing "Level 1 Support" for the Risk Assess Production and Test environments. If after reasonable efforts you are unable to diagnose or resolve problems/issues in the Risk Assess Production or Test environment, you may contact Coupa for "Level 2 Support." See the "How to Obtain Support" section of this document for instructions on how to contact Coupa Support.
Level 1 Support includes (but is not limited to):

- Responding to users regarding the functionality or operation of Risk Assess (i.e. how to use Risk Assess, complete an evaluation, create a new program, etc.)
- Responding to users with respect to problems or issues with Risk Assess
- Diagnosis of problems or issues with Risk Assess
- Resolution of problems or issues with Risk Assess
- Answering general questions from users
- Password resets

General System Maintenance: User creation and management; inactivating/deleting unwanted users; group management; Organization Units creation and maintenance

Field/Object Level Management: Creating/maintaining user-defined fields and user-defined objects; configuring setup data

Program Management: Modification of existing program(s); creation of new program(s); managing the Program Workbench: enrolling suppliers/relationships/engagements/candidate suppliers; migration of programs from Test to Production environment; re-launching and/or cancelling programs; creating and maintaining program components; acceptance text management; creating and maintaining program enrollment rules; creating and maintaining assignment defaults; creating and maintaining teams

Report Development: Creating and maintaining reports; managing data dictionary

Security Policy Management: Configuring security policy; setting permissions; configuring company information and settings

Email Customization for Specific Emails:
*Risk Assess allows you to customize certain emails that the system generates. The majority of these emails are configurable by the customer directly via the Admin tab.
There are other emails that can be customized, but require Coupa assistance to do so.

Please refer to the Risk Assess Email Notification Reference Guide for the most current list of emails customizable by the customer. This guide also details how to perform the customizations to the emails below. The Email Notification Reference Guide can be found in the Resources section of Risk Assess and in the Learning Management System.

What is Coupa Support Responsible For?

This section outlines things that are possible to do in Risk Assess but rely on assistance from Coupa support configure or troubleshoot. Customer resources in the role of Risk Assess Administrator should contact support for assistance with the following activities.

Email Customization for Specific Emails:

Please refer to the Risk Assess Email Notification Reference Guide for the most current list of emails customizable by Coupa. The Email Notification Reference Guide can be found in the Resources section of Risk Assess.

Single Sign-On Issues: If you have purchased Single Sign-On and it has been implemented, Coupa's technical team should be made aware of any issues regarding SSO. Coupa support can then engage the proper resources to work through the issue. Keep in mind that Coupa typically works with the customer's IT team when dealing with SSO. We may ask you to engage these resources if necessary.

Integration Issues: If you have purchased integration that was configured by Coupa, you will need to reach out to Coupa support in the event that you are having issues. Integration events can be quite complex, so any issues will be reviewed by our Integration Engineering team to identify and remedy the issue. Keep in mind that Coupa typically works with the customer's IT team when dealing with integration. We may ask you to engage these resources if necessary.

Localization: Certain standard text appearing in the application can be modified in the event that a customer would like to do so. Coupa support can determine if the requested modification is possible and engage the proper Coupa team members to perform the change.

Tenant Branding/Logo: The Risk Assess application can be branded with the customer's Logo if the customer chooses to do so. If you wish to change the logo that appears in your test or production environments, contact Coupa support and they can work with you to get the proper branding in place.

Patches and Upgrades: As Risk Assess is a SaaS solution, we are responsible for performing upgrades and applying patches to the system. Release notes are published in the Success Portal to provide background on bug fixes and new functionality included in each patch/upgrade. Coupa Support will send out email communication to Authorized Support Contacts notifying them of any update to the application prior to it being applied to the production environment.

How to Obtain Support

Please refer to the Coupa Customer Support Policy Document for specifics around Coupa Support. Below is a summary of how to contact support and who is eligible to do so.

Authorized Contacts: Risk Assess clients may designate "authorized contacts" according to your subscription agreement with Coupa. Typically, it is one primary and one back-up.

An authorized contact must be a person with an individual email address and phone number. Authorized contacts will be provided with a web address, user ID, and password for Coupa's Customer Support portal through which they can open support cases and track the status of their cases.

Authorized contacts may obtain support via an email request to rasupport@coupa.com