

# RISK ASSESS TRAINING

## COURSE DESCRIPTION

### OVERVIEW

This course will cover the basic concepts that form the foundational knowledge base for someone in the role of System Administrator and/or Program Architect.

A Systems Administrator (SA) is responsible for the administration of Coupa Risk Assess Third Party Management Solution (CRA). The SA makes decisions on the structure of the application, assigns user access, manages back-end data entry, and much more. The SA provides application guidance and administrative support to program architects, users, and in some cases, suppliers. Finally, the SA oversees a customer's instance of CRA for their respective company.

A Program Architect (PA) is responsible for the translation of business requirements for risk assessments, compliance attestations, performance appraisals, and information management surveys into an appropriate evaluation or assessment program in CRA. The PA makes decisions on the structure of the program, workflow routings, timing, evaluation item design, scoring schemas, and many more details. The PA then renders these business requirements and operational decisions in a working program by setting the appropriate parameters and creating the necessary data constructs in CRA. Finally, the PA oversees the testing, validation, and production deployment of the program.

### AUDIENCE

A great class for anyone who works with or wants to learn about the Coupa Risk Assess platform. Roles include, but are not limited to: project team, program architects/designers, and system administrators.

### LEARNING OBJECTIVES

- Create suppliers and relationships
- Determine the appropriate design for a program from various alternatives
- Create a relationship-based and enterprise program
- Create an information management program
- Create a robotic program
- Define and use program components for both conventional and information management programs
- Create a basic report
- Utilize common program administration capabilities to manage program operations
- Establish and modify users and set appropriate security permissions
- Manage Coupa Risk Assess data (changing owners, deleting objects)
- Set client company information and settings
- Configure user defined data
- Manage information, settings and tasks associated with Coupa Risk Assess operation
- Import data, settings, user defined fields, supplier, etc. into Coupa Risk Assess

### DURATION

- ▶ 4 days

### DELIVERY FORMAT

- ▶ Classroom
- ▶ In Person or Virtual

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### MODULES AND TOPICS

#### **Basic Risk Assess Data Structure**

Creating objects  
Visualization  
Deleting objects

#### **Designing a Program**

Defining the program

#### **Administering a Program**

Program launch  
Dashboard cockpit  
Program history & status

#### **Creating a Program**

How to create an enterprise program  
How to create an information management program  
Program workbench  
Automating enrollment  
Automating assignment defaults

#### **Extending the Data Model**

UDFs  
UDOs  
Program components

#### **User Management & Security**

Create users/groups  
Manage system security & permissions

#### **Reporting**

How to create

#### **Configuration Data Management**

Setup data  
Data dictionary

#### **Program Management**

Evaluation/approval delegation & status  
Program launch  
Program component library

#### **Email Management**

Email customization  
Email management

#### **Migration Utilities**

Automated migration

#### **Integration**

Manual import integration

#### **Data Management**

Management system data