



ThirdPartyBond

Step-by-Step Tutorials

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About Rsam Tutorials

The Rsam module step-by-step tutorials are designed to help you learn about a specific Rsam module and to gain basic familiarity with the user interface. The Rsam platform is highly configurable and is capable of handling both simple and comprehensive applications. The step-by-step tutorials and Rsam sandboxes, however, are specifically designed to quickly deliver a user experience without requiring further training. Each step-by-step tutorial walks you through common, out-of-the-box functionality within a given Rsam module, allowing you to get immediate hands-on familiarity with the module.

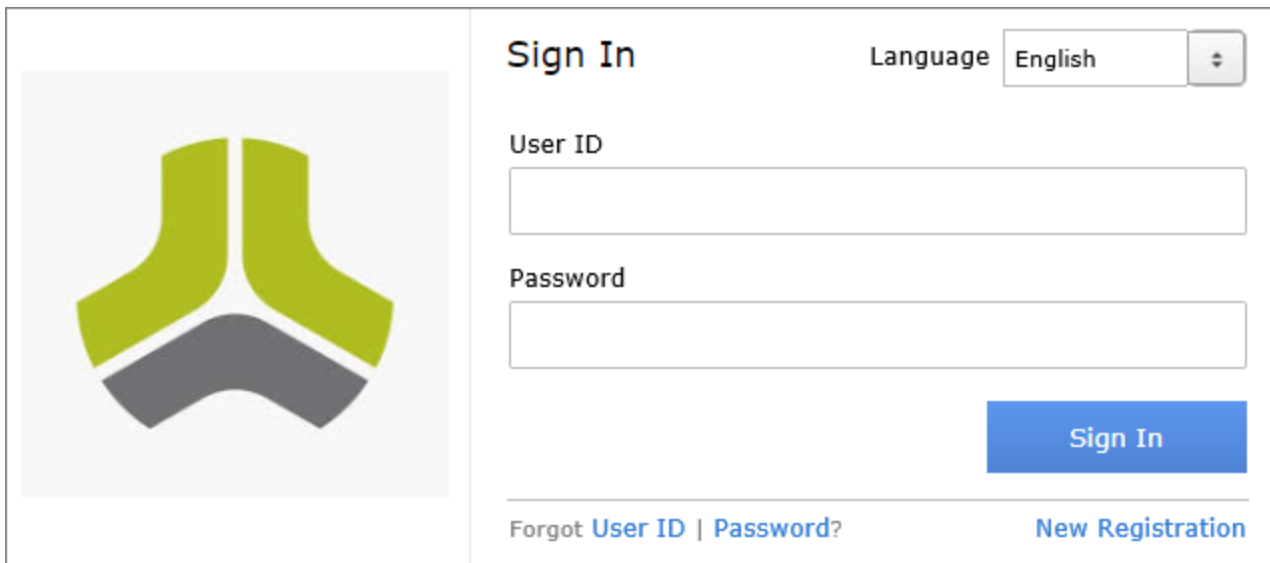
Rsam Sandbox Environment


Rsam module step-by-step tutorials are designed to work with the out-of-the-box Rsam configuration. You may follow this tutorial using an Rsam Sandbox environment or using your own instance of Rsam that you already own. If you are using this tutorial with an Rsam Sandbox environment, the URL to access your Rsam sandbox is delivered through an email. Otherwise, you may contact your Rsam Administrator for the URL to access your Rsam instance.

If you are using an Rsam sandbox environment, you should have provided Rsam with your organization's internet facing IP address. To find this information, open a browser and connect to an IP discovery site such as www.whatismyip.com, or contact your organization's Network Administrator for assistance. You may also contact your Rsam Customer Representative with any questions.

Sign-In Page

Tutorials leverage pre-defined accounts that require manual authentication. While your organization may intend to use SSO authentication, Rsam sandbox environments require manual authentication through the Rsam Sign In page so that you can easily toggle between various sample accounts used throughout the tutorial.

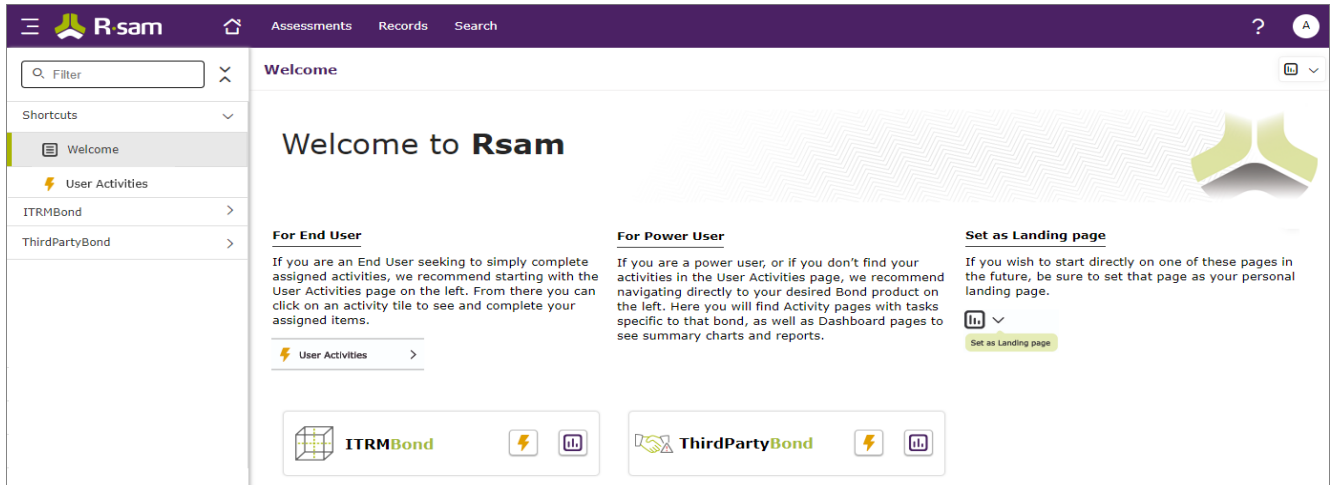


	Sign In	Language <input type="text" value="English"/>
	User ID	<input type="text"/>
	Password	<input type="password"/>
		<input type="button" value="Sign In"/>
	Forgot User ID Password?	New Registration

Like most elements in Rsam, the Sign In page can be configured in a number of ways. Different authentication options such as user self-registration, integration with customer user directories (such as Active Directory), or integration with Single Sign-On products, such as Shibboleth, can be applied. You can also embed your own branding and logo on the Sign In page.


Welcome Page

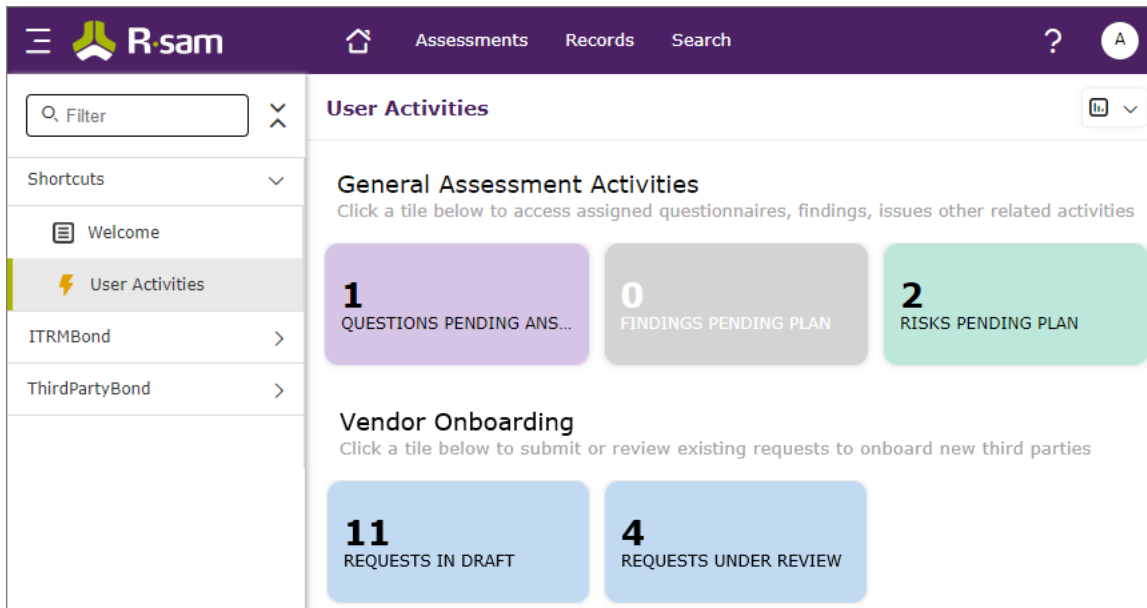
The Welcome Page is the first page that appears when you log in to Rsam for the first time. This page provides navigation instructions and shortcuts to access the most commonly used pages from the bonds you have access to.




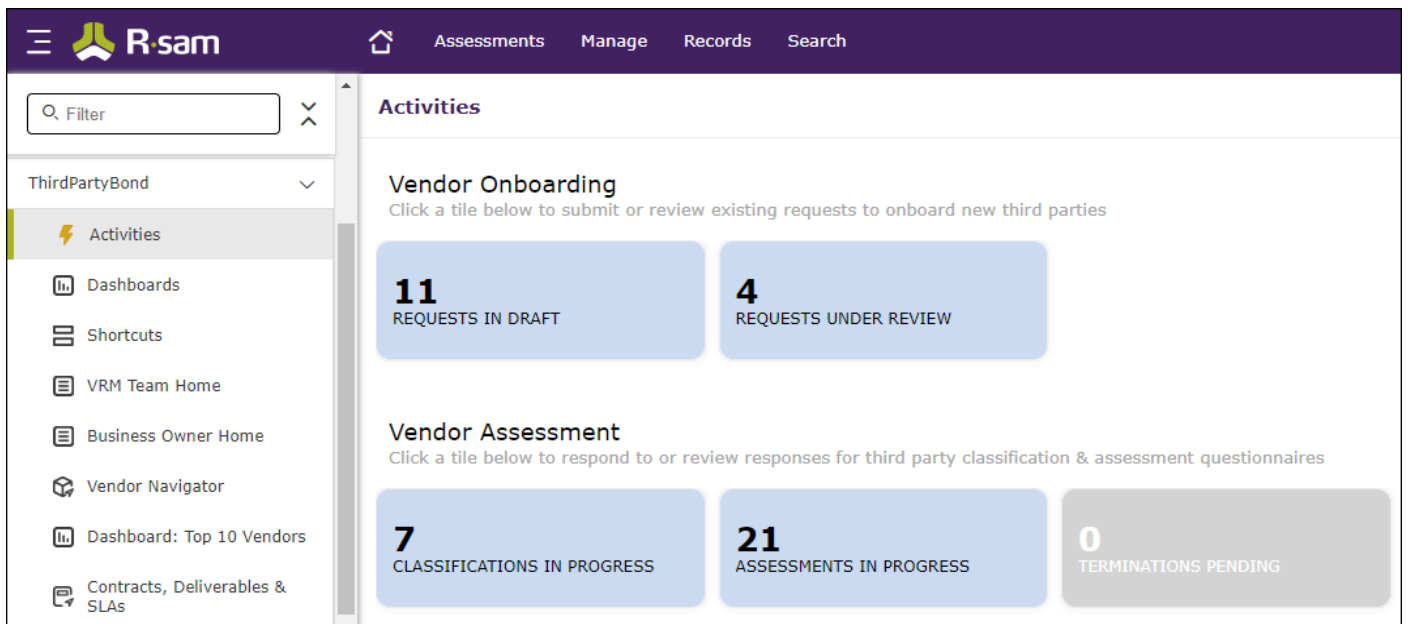
Note: The view of the Welcome Page may be different from the one shown in the image, based on the role of the logged in user.

Navigating to Tasks and Dashboards

If you are an end user and have logged in to complete assigned tasks, you can click  available on the left navigation bar to view the most frequently used Activity Centers *across all bonds assigned for your role*. You can click the relevant activity tile to navigate to your tasks.



If you do not find the required activity tiles, you can either click  corresponding to a bond on the Welcome Page or navigate directly to the bonds from the left navigation bar and select the **Activities** tab to view all related Activity Centers.




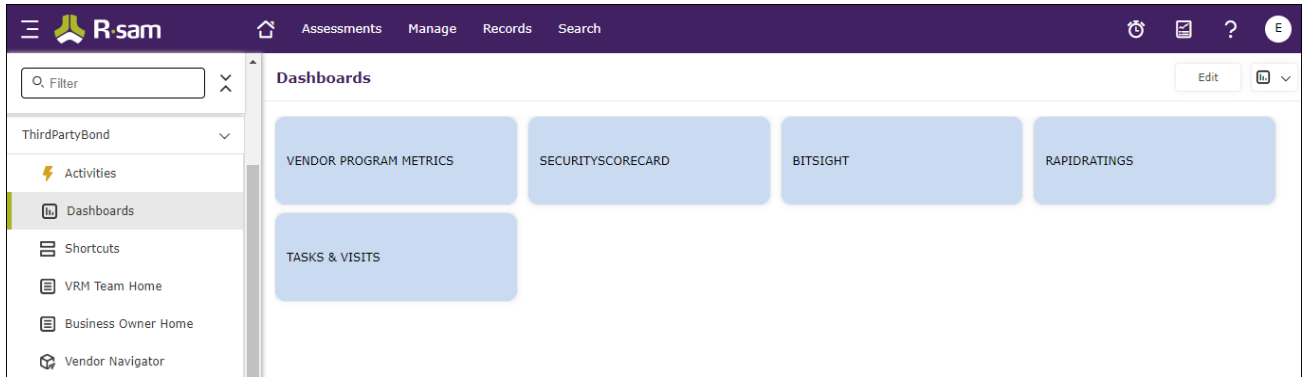
Click an Activity Center tile to view all related tasks.

Additionally, you can perform the following navigation actions:

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ThirdPartyBond

- Click  corresponding to a bond on the Welcome page to view all Dashboards configured for the bond.



Alternatively, you can navigate to the required bond from the left navigation bar and select **Dashboards**.

- Expand the required bond from the left navigation bar and use the pages.

For information on using the home page features and configuring Activity Centers, see the *Rsam Administrator* and *End-User Help*.

ThirdPartyBond Overview

Features and Benefits

ThirdPartyBond helps organizations automate the entire vendor risk management lifecycle – from vendor onboarding and initialization through risk assessment, remediation planning, and ongoing risk and performance monitoring. ThirdPartyBond provides the following capabilities and benefits:

- Role-based workflows enable effective collaboration between internal and external users.
- Automated vendor onboarding request-and-approval workflow streamlines the vendor onboarding process.
- Automated workflow for classifying vendors against pre-defined criticality factors guarantees that vendors are asked to respond only to relevant control self-assessment questionnaires.
- Out-of-the-box content allows you to jump-start your vendor assessment program by leveraging industry best practices and standards.
- Automatic identification of gaps and findings allows your team to spend less time deciphering responses and more time responding to them.
- Ongoing monitoring provides continued visibility into changing vendor risk.

Note: Rsam also offers optional connector products that enhance the ThirdPartyBond by integrating third-party intelligence feeds relating to a vendor’s IT security risk posture, financial viability, compliance status, etc. This tutorial does not cover such integrations explicitly; however, you may see references to BitSight, and other partner-provided content in some of the screenshots that appear in this tutorial.

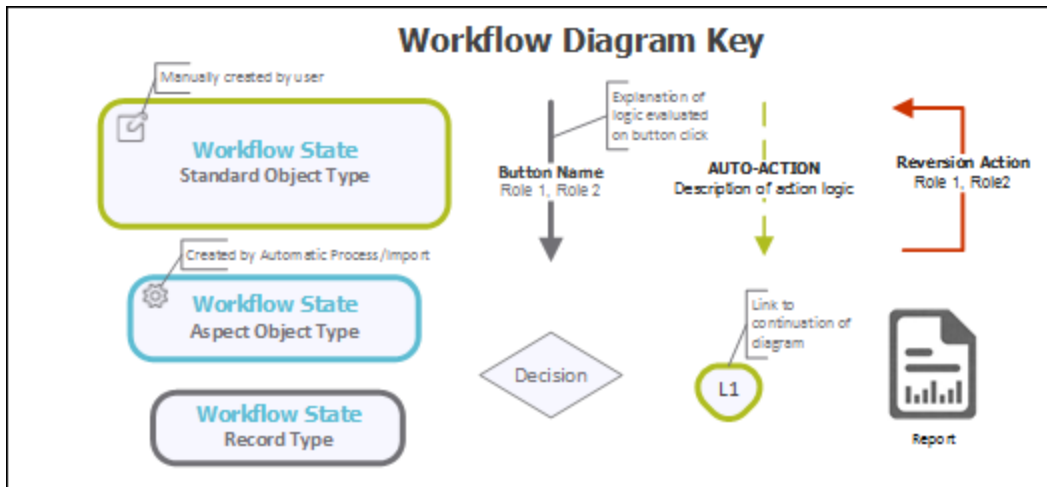
A note on additional tutorials: This tutorial covers specific workflows around contract, SLA, and task management. This tutorial should be regarded as a supplement to the primary Vendor Risk Management step-by-step tutorial, which covers the core questionnaire assessment workflow. Please refer to the Rsam Community Forum or contact your Rsam representative to obtain that guide.

ThirdPartyBond Workflow Diagrams

This section provides illustrations of the following workflows covered in this tutorial:

- Contract and Deliverables Workflow
- Tasks Workflow

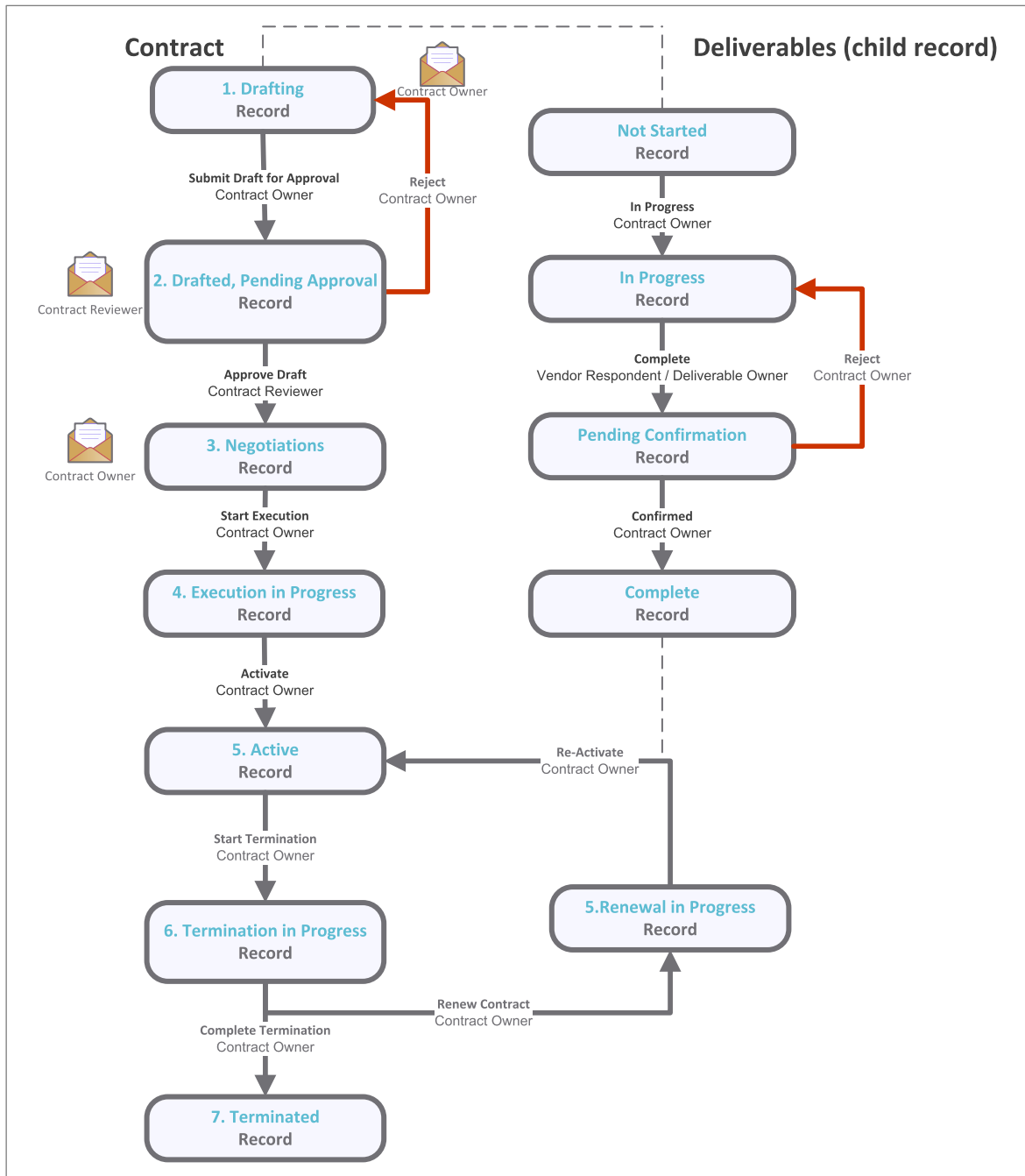
Before proceeding to the specific workflows, it is recommended that you familiarize yourself with the following Rsam workflow diagram key.



Note: Administrators may create variations to any pre-defined workflow configuration to match your specific business processes.

Contract and Deliverables Workflow

The following diagram depicts the out-of-the-box Contract and Deliverables workflow:

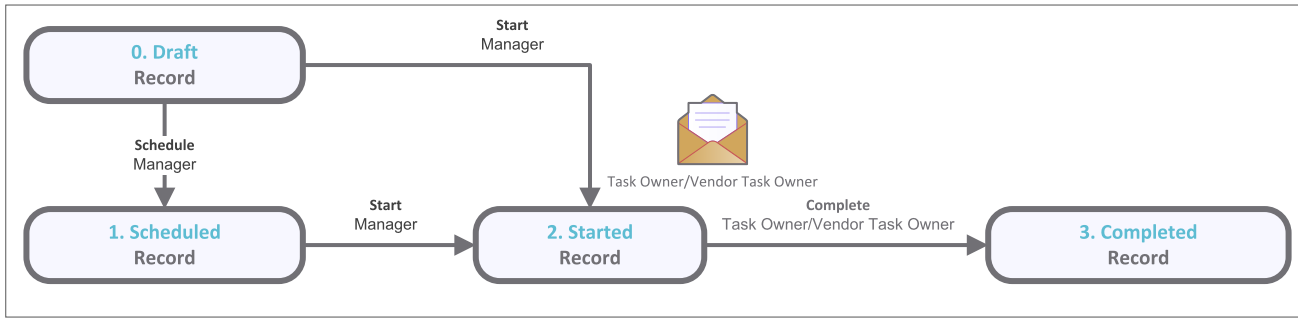


Task Workflow

The following diagram depicts the out-of-the-box Task workflow:

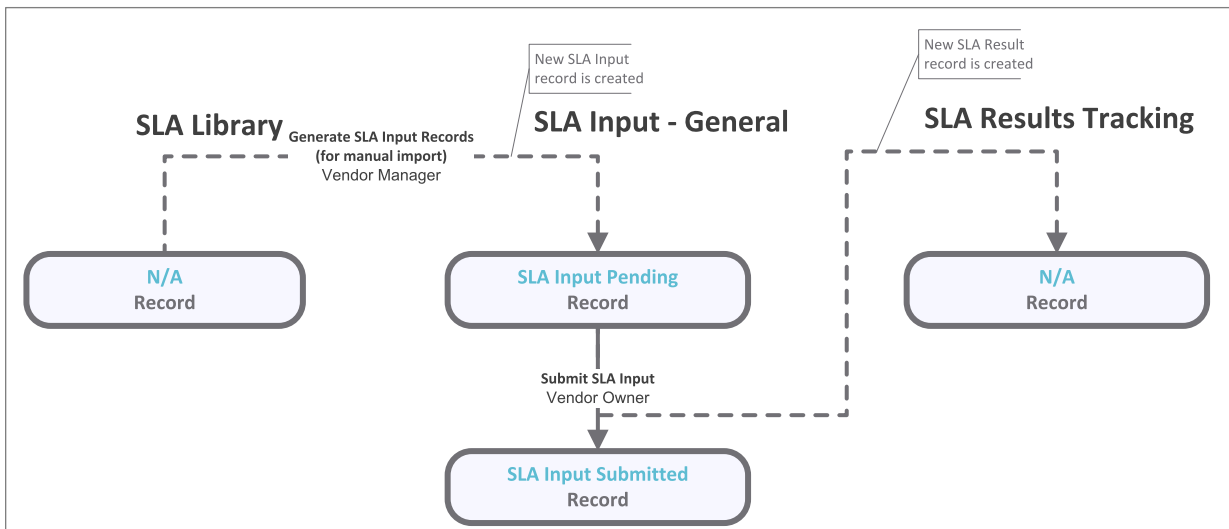
Step-by-Step Tutorials

ThirdPartyBond



SLA Library Workflow

The following diagram depicts the out-of-the-box SLA Library workflow:



User Accounts

The Rsam sandbox for ThirdPartyBond comes with sample user accounts that provide access to various role-based experiences of the ThirdPartyBond. In addition to executing steps in the Vendor Life-Cycle Management workflow, these roles can also execute the steps in the Contract Management, SLAs, and Tasks. The user accounts include:

Note: Sample users for each of these roles are optionally provided with the baseline module installation package

Account ID	User	Description
r_vendor_owner	Contract Owner	This user will be assigned Contract Owner role that represents the business line owner responsible for managing contract with the vendor. This user represents an individual assigned to carry our certain vendor oversight tasks. Can be internal business owner or vendor representative.
r_vendor_reviewer	Vendor Reviewer	This user will be assigned role that represents business line manager who is responsible to approve contracts.
r_vendor_respondent	Vendor Respondent	This user will be assigned role that represent a vendor representative responsible for managing contract deliverables. Often times Vendor Respondent and Deliverable Owner are the same individuals.
r_vendor_manager	Vendor Manager	This user is responsible for overseeing the vendor risk management processes and can create, assign and start new tasks.

Users can contact Rsam Administrator to obtain passwords for assigned accounts. Individual users may change their password once authenticated. Users with administrator permissions may also reset the password of other users.

Overview of High-Level Steps

The following is a high-level list of the steps described in this tutorial.. These steps span across the Contracts workflow, the Deliverables workflow, the Tasks workflow, and the SLA workflow.

Step	User	Description
Step 1: Creating a New Contract	Vendor Owner	In this step, the Vendor Owner creates a new contract and submits it to the Vendor Reviewer for approval of contract.
Step 2: Create a New Deliverable	Vendor Owner	In this step, the Vendor Owner creates a new deliverable and submits the deliverable to the Vendor Respondent user for completion.

Step	User	Description
Step 3: Approving the Contract	Vendor Reviewer	In this step, the Vendor Reviewer approves the contract.
Step 4: Executing the Contract	Vendor Owner	In this step, the Vendor Owner user executes the contract.
Step 5: Activating the Contract	Vendor Owner	In this step, the Vendor Owner user activates the contract.
Step 6: Completing the Deliverable	Vendor Respondent	In this step, the Vendor Respondent user completes the deliverable.
Step 7: Confirming the Deliverable	Vendor Owner	In this step, the Vendor Owner user confirms the deliverable.
Step 8: Creating a New Task	Vendor Manager	In this step, Vendor Manager creates a new task and assigns the task to the Vendor Owner user for flagging as complete.
Step 9: Completing the Task	Vendor Owner	In this step, the Vendor Owner user flags the task as complete.
Step 10: Creating an SLA	Vendor Manager	In this step, the Vendor Manager user creates an SLA Input.
Step 11: Submitting SLA Input	Vendor Owner	In this step, the Vendor Owner user submits the SLA Input.

Step-by-Step Procedure

This section contains detailed steps that will guide you through the module. In this section, you will learn how to work with Contracts, Deliverables, Tasks, and SLAs. This represents the most common path through the workflows, but you are welcome to explore the other paths as well.

Before you begin executing the steps, note the following considerations:

- a. Some organizations may deploy Rsam in a single sign-on environment, which utilizes your corporate login to bypass the Rsam login screen. However, each step in this tutorial potentially requires a different user account, so be sure you have the access to the Rsam login screen and can log in using the different username / password combinations as stated in the steps.
- b. Some workflow state transitions may trigger email notifications to users in the workflow. If you want to ensure that your users receive these notifications, please see the [Setting up Email Addresses](#) section later in this tutorial.

Working with Contracts

ThirdPartyBond provides users with basic contract/deliverables management capabilities. In this section we will review contract creation, approval, and activation process.

Step 1: Creating a New Contract

In this step, you will log in to Rsam as the Vendor Owner user to create and submit a new contract to the Vendor Reviewer for approval.

1. Open an Rsam-supported browser and enter the URL of the Rsam instance where you will complete this tutorial.
2. Sign in as the Vendor Owner user. Enter **User ID** as *r_vendor_owner* and provide the **Password**.
3. Navigate to **Records > Open By Category > Contracts**.
4. In the list of objects, click the **Contracts** link associated with the object for which you want to create a contract. As part of this tutorial, we will use the Alliance Ltd object.

The Vendor / Service Provider object opens with the **Contracts** category selected.

- Click **Add** and select **Contract**.

Record	Workflow State	Contract Name	Contract Owner	Effective Date	Target Execution Date
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	1. Drafting	Master Service Agreement for Alliance Ltd.	Vendor Owner	2016-02-29	2016-02-15
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	1. Drafting	Statement of Work for Phase 1 Implementation of Product D	Vendor Owner	2016-02-29	2016-02-15
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/>	1. Drafting	Service Service-Level Agreement for Project D	Vendor Owner	2016-02-29	2016-02-15

A new **Contract** record opens with the **Contracts** tab selected.

- Complete the **Contract Name**, **Contract Description**, **Contract Type**, **Total Contract Amount**, **Contract Owner**, **Contract Reviewer**, and **Target Execution Date** attributes.
- Set the **Contract Owner** attribute to **Vendor Owner (r_vendor_owner)**.
- Set the **Contract Reviewer** attribute to **Vendor Reviewer (r_vendor_reviewer)**.
- Complete any other attributes that are required to you. Ensure that the attributes marked with an asterisk (*) are completed.

*** Contract (new)** Editable

Update Save & Close Action

1. Drafting 2. Drafted, Pending Approval 3. Negotiations 4. Execution in Progress 5. Active 6. Termination in Progress 7. Terminat

Contracts Deliverables Related SLAs Related Risks Discussion / Thread Workflow History

* Contract Name Finance and Accounts * Contract Type Consulting Agreement

* Contract Description Finance and Accounts * Total Contract Amount \$100,000.00

Clauses Included

* Contract Owner Vendor Owner * Contract Reviewer Vendor Reviewer

* Target Execution Date 10/31/2018 Actual Execution Date

Effective Date Expiration Date

Renewal Reminder Renewal Reminder Notification Date

10. Click **Action** and select **Submit Draft for Approval**.
11. In the message that appears indicating to save the changes and continue, click **OK**.
The newly created contract enters the **Drafted, Pending Approval** workflow state.

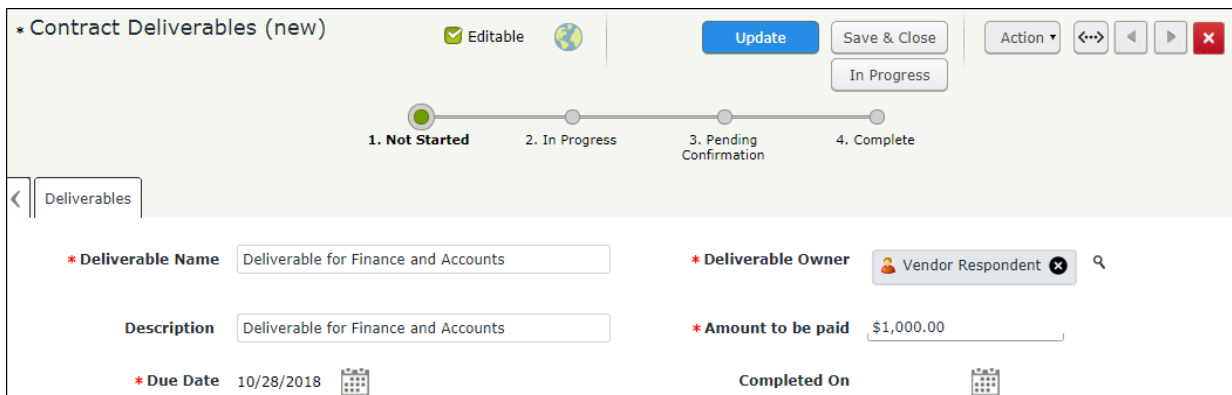
Step 2: Create a New Deliverable

In this step, by staying signed in as the *r_vendor_owner* user, you will create a deliverable to be tracked and updated either by internal users or by vendor users. In this example, the deliverable will be updated by the *Vendor Respondent* user. A *Contract Owner* can also create a deliverable.

1. Ensure that you are signed in as the *r_vendor_owner* user.
2. In the navigation panel on the left, go to **ThirdPartyBond > Activities >** and Under **Contracts & SLAs**, click the **Contracts in Progress** tile.
3. Double-click the contract you created in [Step 1: Creating a New Contract](#). The **Contract** record opens with the **Contracts** tab selected.
4. Click the **Deliverables** tab.
5. Under **Contract Deliverables**, click **Add**.
6. Enter **Deliverable Name**, **Deliverable Owner**, **Amount to be paid**, and **Due Date**. Set the **Deliverable Owner** attribute to **Vendor Respondent (r_vendor_respondent)**.

Note: The amount paid for the deliverable must be less than the total contract value.

7. Enter other attributes that are necessary to you.



* Contract Deliverables (new) Editable

Update Save & Close Action

In Progress

1. Not Started 2. In Progress 3. Pending Confirmation 4. Complete

Deliverables

* Deliverable Name Deliverable for Finance and Accounts

* Deliverable Owner Vendor Respondent

Description Deliverable for Finance and Accounts

* Amount to be paid \$1,000.00

* Due Date 10/28/2018

Completed On

8. Click **In Progress**. The **Contract Deliverables** record enters the **In Progress** workflow state.
9. Hover the mouse over the username and click **Logout**.

Step 3: Approving the Contract

In this step, you will log in to Rsam as the *Vendor Reviewer* user to approve the contract.

1. Sign in as the *Vendor Reviewer* user. Enter **User ID** as *r_vendor_reviewer* and provide the **Password**.
2. In the navigation panel on the left, go to **ThirdPartyBond > Activities >** and Under **Contracts & SLAs**, click the **Contracts in Progress** tile.
3. Select the contract in the **Drafted, Pending Approval** workflow state.
4. Click **Action** and select **Approve Draft**. The Contract record enters the **Negotiations** workflow state.
5. Hover the mouse over the username and click **Logout**.

Step 4: Executing the Contract

In this step, you will log in to Rsam as the *Vendor Owner* user to start the execution of a contract.

1. Sign in as the *Vendor Owner* user. Enter **User ID** as *r_vendor_owner* and provide the **Password**.
2. In the navigation panel on the left, go to **ThirdPartyBond > Activities >** and Under **Contracts & SLAs**, click the **Contracts in Progress** tile.
3. Select the contract in the **Negotiations** workflow state.
4. Click **Action** and select **Start Execution**. The **Contracts** record enters the **Execution in Progress** workflow state.

Step 5: Activating the Contract

In this step, by staying signed into Rsam as the *Vendor Owner* user, you will activate the contract.

1. In the navigation panel on the left, go to **ThirdPartyBond > Activities >** and Under **Contracts & SLAs**, click the **Contracts in Progress** tile.

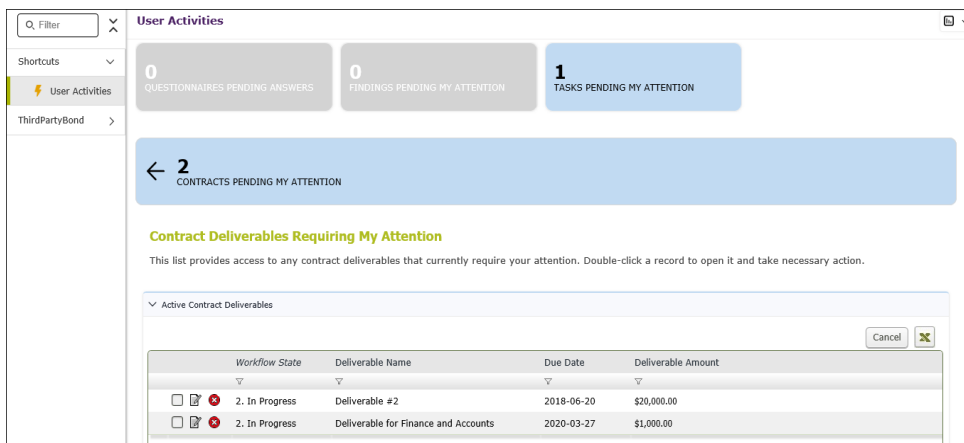
2. Double-click the contract in the **Execution in Progress** workflow state. The **Contract** record opens with the **Contract** tab selected.
3. Before activating the contract, set **Actual Execution Date, Effective Date, Expiration Date**, and attach the final contract to the **Executed Contract(s)** attribute.
4. Click **Action** and select **Activate**. The **Contract** record enters the **Active** workflow state.
5. Hover the mouse over the username and click **Logout**.

Step 6: Completing the Deliverable

In this step, you will log in to Rsam as the *r_vendor_respondent* user to complete the deliverable. A *Deliverable Owner* can also complete the deliverable.

1. Sign in as the *Vendor Respondent* user. Enter **User ID** as *r_vendor_respondent* and provide the **Password**.
2. In the navigation panel on the left, go to **Shortcuts > User Activities** and click the **Contracts Pending My Attention** tile.

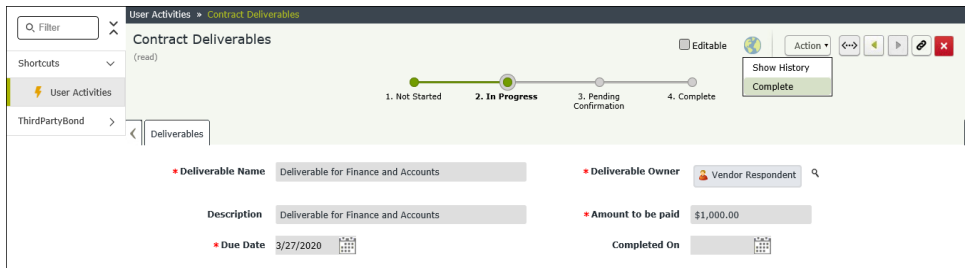
The Contracts list appears.



The screenshot shows the 'User Activities' dashboard. At the top, there are three summary tiles: '0 QUESTIONNAIRES PENDING ANSWERS', '0 FINDINGS PENDING MY ATTENTION', and '1 TASKS PENDING MY ATTENTION'. Below these is a larger blue tile with a left arrow and the number '2', labeled 'CONTRACTS PENDING MY ATTENTION'. Underneath this tile is a section titled 'Contract Deliverables Requiring My Attention' with a sub-header 'Active Contract Deliverables'. A table lists the active deliverables:

Workflow State	Deliverable Name	Due Date	Deliverable Amount
2. In Progress	Deliverable #2	2018-06-20	\$20,000.00
2. In Progress	Deliverable for Finance and Accounts	2020-03-27	\$1,000.00

- Double-click the deliverable that you created in [Step 2: Create a New Deliverable](#).



- Click **Action** and select **Complete**.

The deliverable record enters the **Pending Confirmation** workflow state.

- Hover the mouse over the username and click **Logout**.

Step 7: Confirming the Deliverable

This step can be executed by logging in either as the *Vendor Owner* user. In this step, you will confirm the deliverable by logging in to Rsam as the *r_vendor_owner* user.

- Sign in as the *Vendor Owner* user. Enter **User ID** as *r_vendor_owner* and provide the **Password**.
- In the navigation panel on the left, go to **Shortcuts > User Activities** and click the **Contracts Pending My Attention** tile.
- Double-click the contract for the Alliance Ltd vendor object. The **Contract** record opens with the **Contracts** tab selected.
- Click the **Deliverables** tab.
- Double-click to open the deliverable and then click **Action** and select **Confirmed**. The deliverable record enters the **Complete** workflow state.
- Hover the mouse over the username and click **Logout**.

Working with Tasks

ThirdPartyBond allows users to record and track vendor oversight tasks. Tasks are used to manage various activities such as site visits or business reviews and assign tasks to vendor within the tool.

Step 8: Creating a New Task

In this step, you will log in to Rsam as the *r_vendor_manager* user to create a new task.

1. Sign in as the **Vendor Manager** user. Enter **User ID** as *r_vendor_manager* and provide the **Password**.
2. In the navigation panel on the left, go to **ThirdPartyBond > Vendor Navigator**.
3. In the vendors list, double-click your object. As part of this tutorial, we will use the Alliance Ltd vendor object.

Alliance Ltd vendor object details appear.

Vendors (nav) Search Refresh Cancel Add Open Delete Assign... Action X					
Name	Vendor ID	Vendor Type	Business Owner / Sponsor	Vendor Service	
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Abou-Merhi Lines Sal	437679	3rd-Party Organization	Vendor Owner	Creative & Ma Customer / Pr Distributor / R	
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> Alliance Ltd.	437567537	3rd-Party Organization	Vendor Owner	Construction &	
<input type="checkbox"/> <input type="checkbox"/> <input type="checkbox"/> CC Payment Inc.	337853	3rd-Party Organization	Vendor Owner	Construction & Creative & Ma	

4. Under **Supplemental Records**, click **Tasks**.

The Alliance Ltd vendor object opens with the **Tasks** tab selected.

5. Click **Add** and select **Task**.

A new Task record opens with the **Task Info** tab selected

• Task (new) Editable Update Save & Close Start Action

0. Draft 1. Scheduled 2. Started 3. Completed

Task Info Tracking Info Discussion Thread

* Task Type

Task Description * Start Date

* Department/Vendor * Target Due Date

Task Owner

Vendor Task Owner

File Attachment(s) 0 File Attachments

6. Complete **Task Type**, **Task Description**, **Task Owner**, **Department/Vendor**, **Start Date**, and **Target Due Date**.

- Based on the **Department/Vendor** selected, either the **Task Owner** attribute or the **Vendor Task Owner** attribute appears.

When **Vendor** is selected in the **Department/Vendor** attribute, the **Vendor Task Owner** attribute appears, where you can select the Vendor Respondent (r_vendor_respondent). For any other **Department/Vendor** option, the **Task Owner** attribute appears, where you can select the Vendor Owner (r_vendor_owner).

- Click **Start**.

Note: If not started manually (that is when the user does not click the Start button), all scheduled tasks will start automatically based on the start date.

- Hover the mouse over the username and click **Logout**.

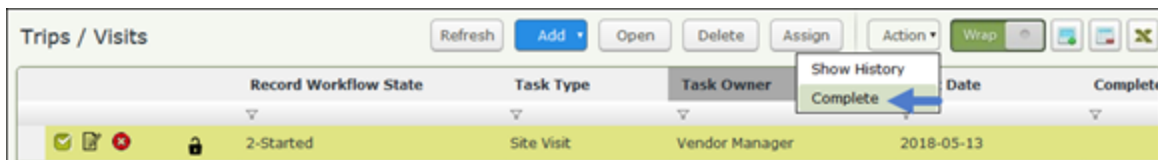
Step 9: Completing the Task

In this step, you will log in to Rsam as the *r_vendor_Owner* user to flag the task as complete.

- Sign in as the *Vendor Owner* user. Enter **User ID** as *r_vendor_owner* and provide the **Password**.
- In the navigation panel on the left, go to **ThirdPartyBond > Vendor Navigator**.

Note: This step can also be accomplished through the Activity Centers when there are a small number of tasks to be completed.

- In the vendors list, double-click your object. As part of this tutorial, we will use the Alliance Ltd vendor object. Alliance Ltd vendor object details appear.
- Under **Supplemental Records**, click **Tasks**. The Alliance Ltd vendor object opens with the **Tasks** tab selected.
- Select the task and click **Action > Complete**.



- Hover the mouse over the username and click **Logout**.

Working with SLAs

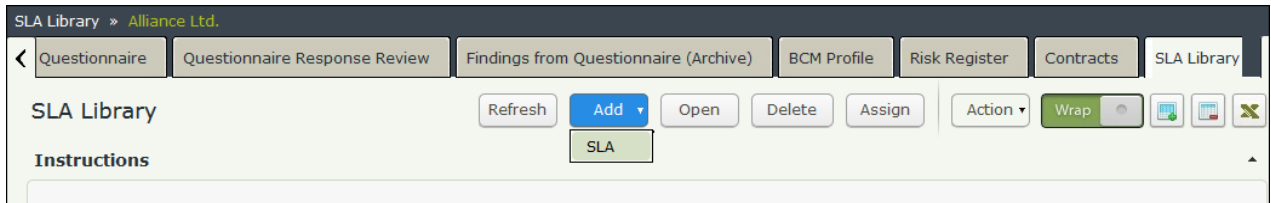
SLAs in the ThirdPartyBond allow you to track suppliers.

Step 10: Creating an SLA

In this step, you will log in to Rsam as the Vendor Manager user to create an SLA.

1. Sign in as the *Vendor Manager* user. Enter **User ID** as **r_vendor_manager** and provide the **Password**.
2. Navigate to **Records > Open By Category > SLA Library**.
3. In the list of objects, click the **SLA Library** link associated with the object for which you want to create an SLA. As part of this tutorial, we will use the Alliance Ltd object.

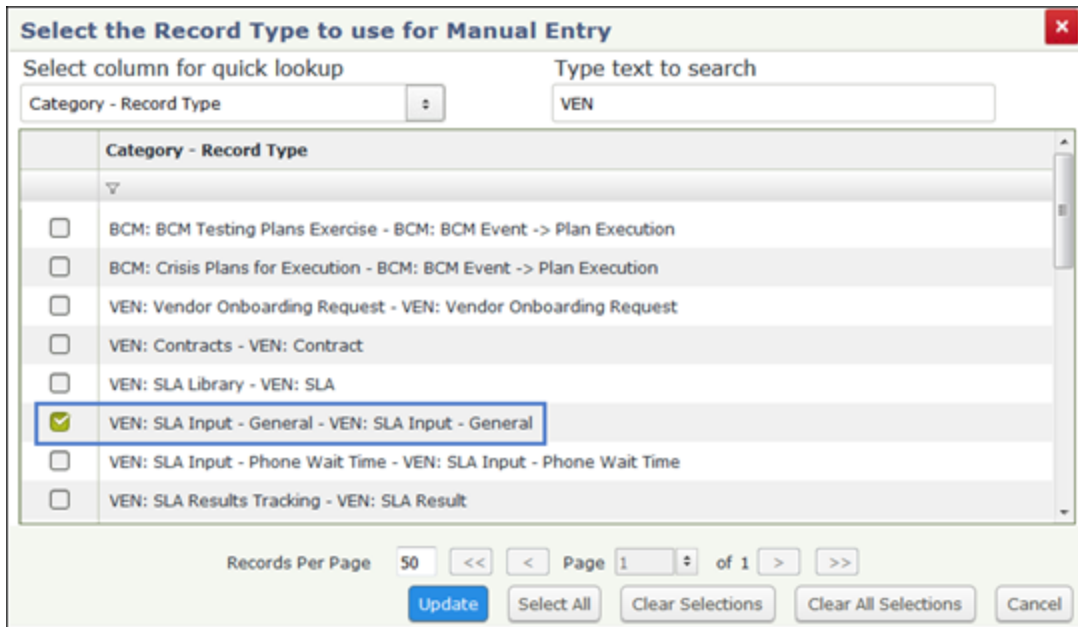
The Vendor / Service Provider object opens with the **SLA Library** category selected.



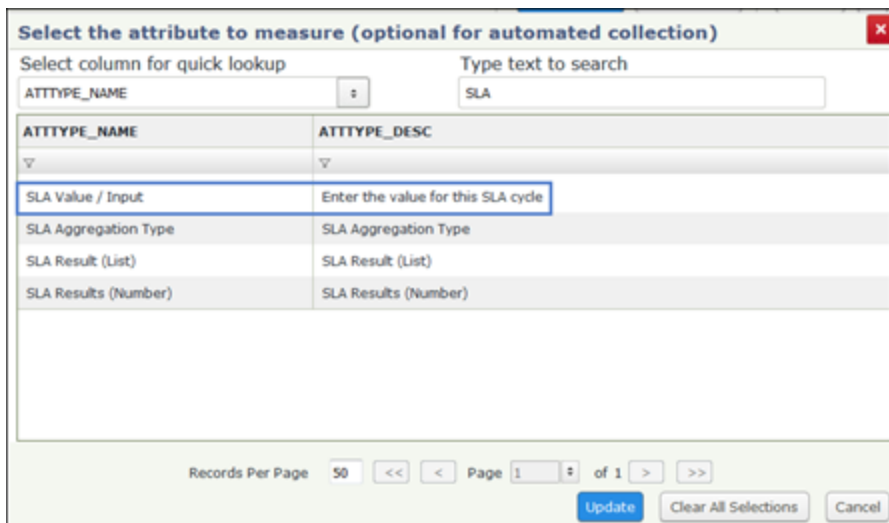
4. Click **Add** and select **SLA**.

A new **SLA** record opens with the **Contracts** tab selected.

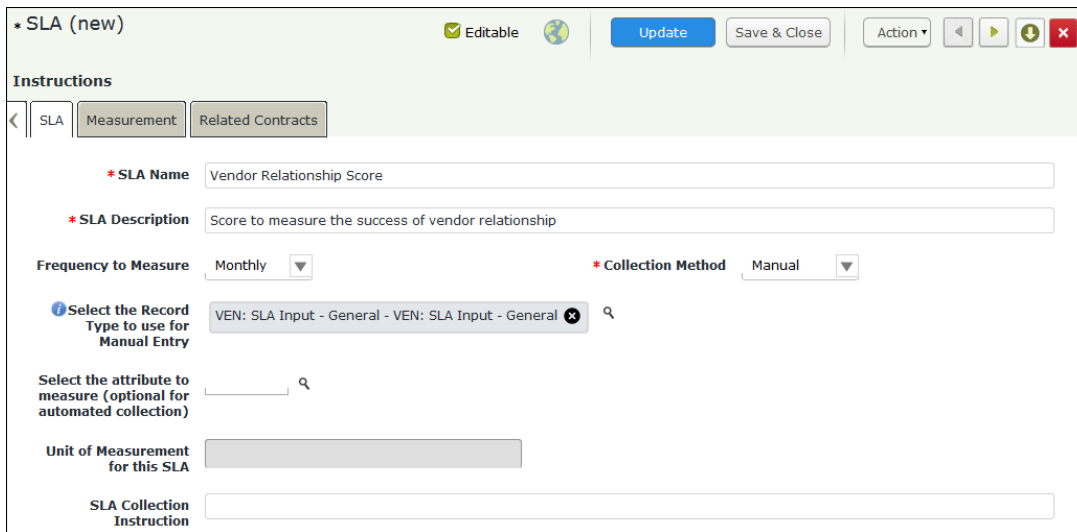
5. Complete the **SLA Name**, **SLA Description**, **Collection Methods**, and **Number of Days to Complete New Input Records** attributes. You may complete other fields if they are required to you.
6. Click the magnifying glass icon associated with the **Select the Record type to use for Manual Entry** attribute. In the dialog that opens, search and select **VEN: SLA Input – General - VEN: SLA Input – General**, and then click **Update**.



- Click the magnifying glass icon associated with the **Select the attribute to measure (optional for automated collection)** attribute. In the dialog that opens, search and select **SLA Value / Input**, and then click **Update**.

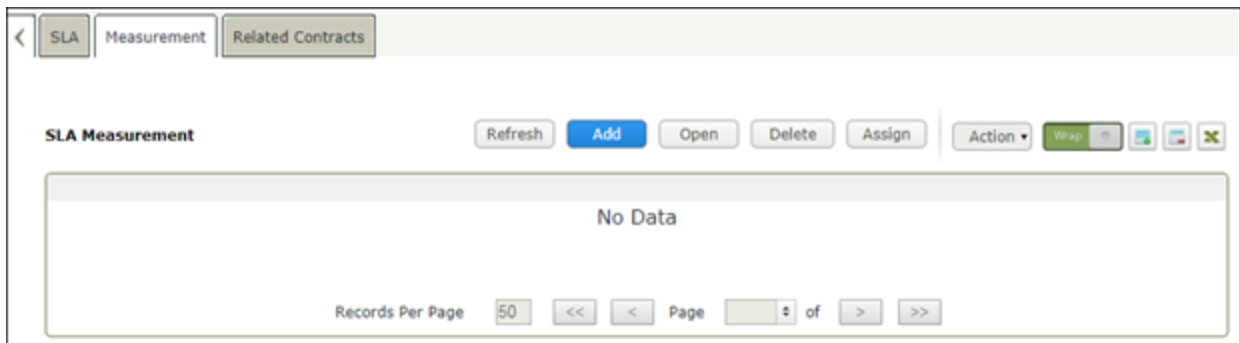


- Complete the **No. of Days to complete the measurement** attribute. For the sake of completing this tutorial, we will enter **5**.



9. Click the **Measurement** tab.

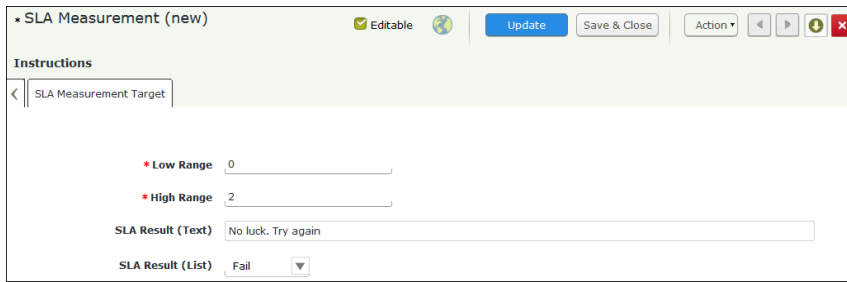
10. Click **Add**.



A new **SLA Measurement** record opens with the SLA Measurement Target tab selected.

11. Complete the **Low Range** and **High Range** attributes. For the sake of completing this tutorial, we will enter **0** for **Low Range** and **2** for **High Range**.

- 12. Select **SLA results (List)** to indicate this range will constitute a **Fail** result.



The screenshot shows a form titled "SLA Measurement (new)". It includes an "Instructions" section with a tab labeled "SLA Measurement Target". Below this, there are two input fields: "Low Range" with the value "0" and "High Range" with the value "2". There is also a text input field for "SLA Result (Text)" containing "No luck. Try again" and a dropdown menu for "SLA Result (List)" set to "Fail". At the top right, there are buttons for "Update", "Save & Close", and "Action".

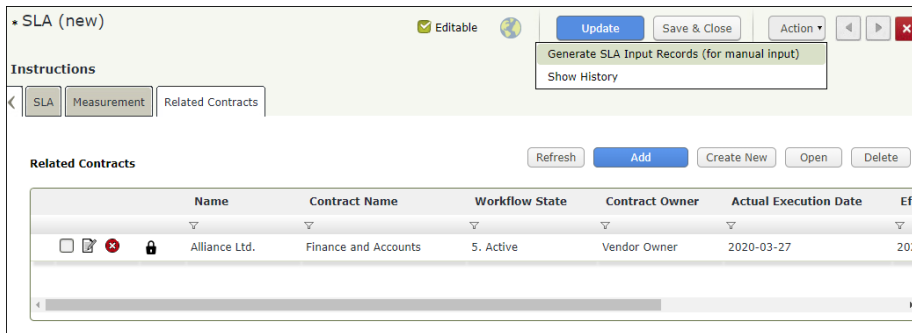
- 13. Click **Save & Close**.
- 14. Add another SLA measurement, enter **3** for **Low Range** and **5** for **High Range**.
- 15. Select **SLA results (List)** to indicate this range will constitute a **Pass** result.
- 16. Click **Save & Close**.
- 17. Click the **Related Contracts** tab.



The screenshot shows a dialog box with three tabs: "SLA", "Measurement", and "Related Contracts". The "Related Contracts" tab is active, displaying a table with the following headers: "Object Name", "Contract Name", "Record Workflow State", and "Contract". Above the table are buttons for "Refresh", "Add", "Create New", "Open", and "Delete".

- 18. Click **Add**.
The **Related Contracts** dialog appears.
- 19. Select a desired contract and click **Update**. The contract is added to the **Related Contracts** grid.

20. Click **Action** and select **Generate SLA Input Records (for Manual input)**.



21. Hover the mouse over the username and click **Logout**.

Step 11: Submitting the SLA Input

In this step, you will log in to Rsam as the *Vendor Owner* user to submit the SLA Input.

1. Sign in as the *Vendor Owner* user. Enter **User ID** as **r_vendor_owner** and provide the **Password**.
2. In the navigation panel on the left, go to **ThirdPartyBond > Activities >** and Under **Contracts & SLAs**, click the **SLAs Input Pending** tile.
3. Select the object for which you want to submit the SLA. As part of this tutorial, we will use the Alliance Ltd object.
4. Double-click the SLA that you created in [Step 10: Creating an SLA](#).
5. Provide a value for the **Enter the value for this SLA cycle** attribute and click **Submit SLA Input**.

At this point, a new SLA result record will be generated with provided scores recorded in that record along with Pass/Fail distinction for each provided input.

6. Hover the mouse over the username and click **Logout**.

Appendix 1: Email Notifications and Offline Decision Making

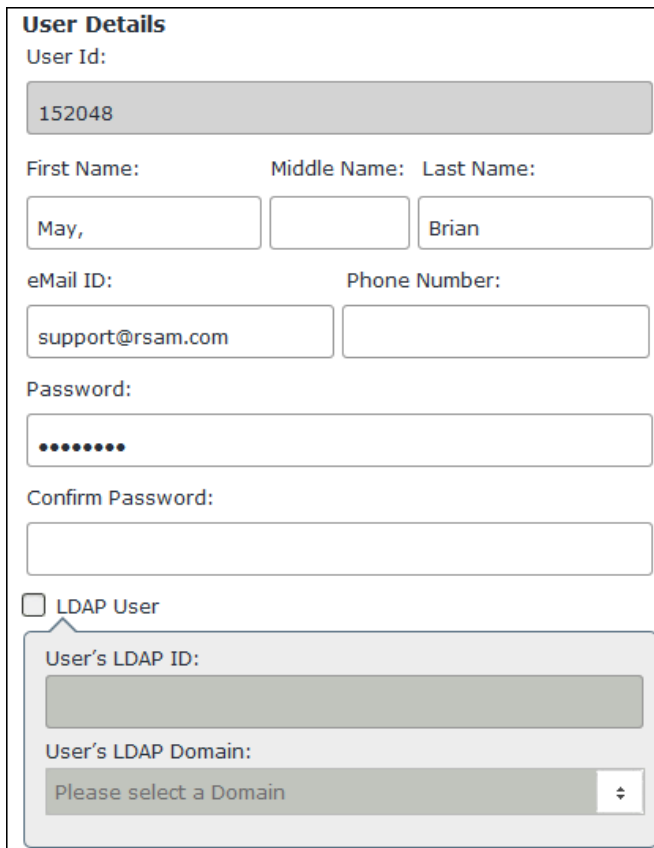
Setting up Email Addresses

This module is configured to send automated email notifications at specific points in the workflow. In a production system, email addresses are usually gathered automatically using an LDAP server or a directory service. However, the email addresses in your Rsam instance can be manually provided for testing purposes.

To manually provide the email addresses, perform the following steps:

1. Open an Rsam supported browser and enter the URL of your Rsam instance containing the ThirdPartyBond module.
2. Sign in as *r_admin* user. Enter **User ID** as *r_admin* and provide the **Password**.
3. Navigate to **Manage > Users/Groups**.
4. Double-click a user row to open the details.

5. Provide an email address in the **eMail ID** attribute.



User Details

User Id:
152048

First Name: Middle Name: Last Name:
May, Brian

eMail ID: Phone Number:
support@rsam.com

Password:
.....

Confirm Password:

LDAP User

User's LDAP ID:
.....

User's LDAP Domain:
Please select a Domain

6. Click **OK**.

The email address of the user account is saved.

Offline Decision Making

Rsam email notifications are configurable including what notification should be sent, what users or roles will receive the notifications, and the content in the notifications.

Offline Decision Making is a powerful and popular feature of Rsam. It provides the Rsam platform directly to the users to perform workflow actions without connecting to the Rsam module. The following image illustrates an example notification template that has custom text, data from the record, embedded links to the application, and Offline Decision-Making actions.

Subject: RE: Exception Request #2241 Confirmation for Bill Smith

Subject: Exception Request #2241 Confirmation for Bill Smith

A preliminary approval has been submitted for Exception Request #2241, submitted by Bill Smith on 5/5/2014. You have been assigned as the senior reviewer in charge of final acceptance or rejection of this request.

Details:
Exception Request: #2241
Submitted by: Bill Smith on 5-5-2014
Approved by: Wanda Johnson on 5-10-2014
Expiration Date: 5-15-2014

Short Description: ([View Full Details in Rsam](#))

The new implementation of "Order-It" (order management system) is unable to conform to the organization 3DES encryption standard. DES has been implemented until the vendor can support fully support 3DES. A temporary exception is requested until that time.

Select an action from the list below:

- [Accept this Request](#)
- [Reject this Request](#)

Appendix 2: Rsam Documentation

ThirdPartyBond Baseline Configuration Guide

To learn more about the pre-configurations in the ThirdPartyBond, refer the *ThirdPartyBond Baseline Configuration Guide*. You should have received the *ThirdPartyBond Baseline Configuration Guide* along with the ThirdPartyBond sandbox. If not, please contact your Rsam Customer Representative to obtain an electronic copy of the *ThirdPartyBond Baseline Configuration Guide*.

Online Help

This tutorial provides the step-by-step instructions for the Rsam ThirdPartyBond module. To get familiar with the specific Rsam features used in this configuration, refer the *Rsam End-User Help*, *Rsam Administrator Help*, or both. The Online help you can access depends on your user permissions.

To access the Online Help, perform the following steps:

1. Sign in to your Rsam instance. For example, sign in as *Example Administrator* user. Provide the **User ID** as *r_admin* and provide the **Password**.
2. Hover the cursor over **Help** and select an Online help from the menu that appears. Depending on your user permissions, you will be able to access the Rsam End-User Help, Rsam Administrator Help, Step-by-Step Tutorials, or all.

The following image shows the *Rsam Administrator Help*, opened from the *Example Administrator*

user account.

