

# ONSITE TRAINING

Maximize Learning. Minimize Downtime.

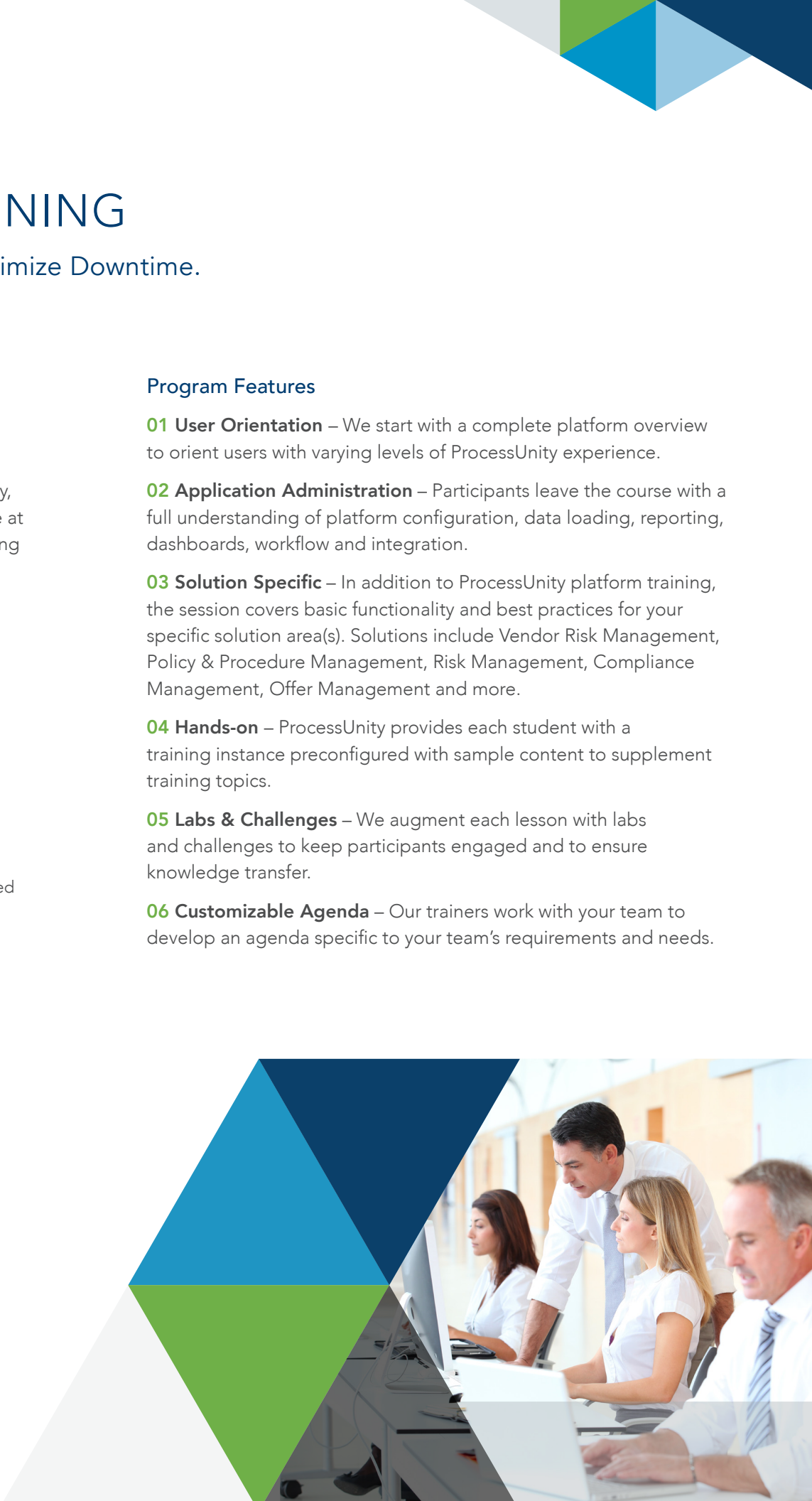
ProcessUnity's formal Onsite Training program is a flexible, cost effective way to train groups of up to 20 individuals on ProcessUnity functionality. Our private, three-day, instructor-led courses are available at the location of your choice, reducing travel costs and time away from the office.

## Program at a Glance

- 3-Day, Onsite Training Class
- Up to 20 Attendees
- Location of Your Choice<sup>1</sup>
- 2 ProcessUnity Trainers (Subject Matter Experts)
- Fixed-Price Includes ProcessUnity Travel<sup>2</sup>, Training Instances and Printed Course Materials

## Program Features

- 01 User Orientation** – We start with a complete platform overview to orient users with varying levels of ProcessUnity experience.
- 02 Application Administration** – Participants leave the course with a full understanding of platform configuration, data loading, reporting, dashboards, workflow and integration.
- 03 Solution Specific** – In addition to ProcessUnity platform training, the session covers basic functionality and best practices for your specific solution area(s). Solutions include Vendor Risk Management, Policy & Procedure Management, Risk Management, Compliance Management, Offer Management and more.
- 04 Hands-on** – ProcessUnity provides each student with a training instance preconfigured with sample content to supplement training topics.
- 05 Labs & Challenges** – We augment each lesson with labs and challenges to keep participants engaged and to ensure knowledge transfer.
- 06 Customizable Agenda** – Our trainers work with your team to develop an agenda specific to your team's requirements and needs.



## Sample Agenda (e.g. Vendor Risk Management Focused)

### Customer Benefits



**Cost-Effective** – Fixed price training at the location of your choice reduces travel costs and keeps your team closer to their day jobs. (ProcessUnity's travel and expenses are included in the price.)



**Focus on Retention** – Hands-on lessons combined with labs, challenges and discussion/collaboration with our team transforms your team into ProcessUnity experts.

Learn more about  
ProcessUnity's Onsite Training  
& Enablement. Contact us at  
[training@processunity.com](mailto:training@processunity.com).

1. Customer is responsible for providing participants with Internet-enabled computers/laptops capable of running ProcessUnity solutions. Access to Microsoft Excel is also recommended. Training facility must be equipped with an HDMI enabled projector and screen.

2. Travel outside the continental United States is additional. Please contact us for rates.

DAY	TOPIC / FOCUS	MORNING SESSION	AFTERNOON SESSION
01	<b>ProcessUnity Introduction / Platform Administration</b>	<ul style="list-style-type: none"> <li>ProcessUnity Introduction</li> <li>Administration Introduction</li> <li>User Management</li> <li>Data Security</li> <li>Basic Properties</li> </ul>	<ul style="list-style-type: none"> <li>Advanced Properties</li> <li>Import Templates</li> <li>Export Mechanisms</li> <li>Notifications / Workflow</li> </ul>
02	<b>Vendor Risk Management</b>	<ul style="list-style-type: none"> <li>VRM Configuration Overview</li> <li>Vendor Classification / Inherent Risk Models</li> <li>Vendor Data Model / Objects</li> <li>Questionnaire Templates / Scoring / Configuration</li> <li>SIG Questionnaires / Connector</li> <li>Questionnaire Assessments</li> <li>Assessment Types / Scoping</li> </ul>	<ul style="list-style-type: none"> <li>VRM Walkthrough</li> <li>Initiating &amp; Scoping Assessments</li> <li>Vendor Portal / Import SIG / Attaching Docs</li> <li>Follow-up Workflow</li> <li>Reporting, Remediation (Issues, Findings)</li> <li>Bulk Assessments</li> <li>Best Practices</li> </ul>
03	<b>Reporting / Integration</b>	<ul style="list-style-type: none"> <li>Intro to Custom Reporting</li> <li>Report Levels</li> <li>Report Filters (interactive and design-time)</li> <li>Formatting / Grouping / Visuals / Charting</li> <li>Report Publishing / Sharing</li> <li>Dashboards (building / publishing)</li> </ul>	<ul style="list-style-type: none"> <li>Trending / Historical Data Reports</li> <li>Integration Overview / Options / Web Services</li> <li>External Components</li> <li>Microsoft Excel Connector</li> <li>Microsoft Word Connector</li> <li>Analytics Database</li> </ul>

