

Please **mute your phone** during today's presentation.

But don't stay quiet. We do want to hear from you! And we will by introducing some **interactive Q&A**.

If questions are not answered during the session, we will respond later via email or through your partner contact.

This session is being recorded for future access.

Slide deck will be made available.

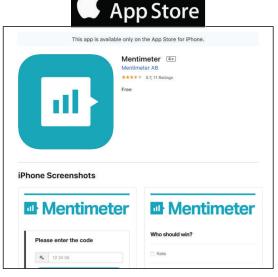
Instructions for Menti™

We will use MentiMeter™ to facilitate Q&A, and access brief interactive quizzes. Everything is anonymous.

- Three methods to access this free site (shown below).
- Use Code 63 11 65







Download on the



Introduction

Learn about you

Please answer these via menti.com

Level-setting now will help influence time spent on specific topics and what degree of detail may be warranted.

Question 1

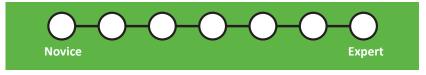
Where in the world are you right now?

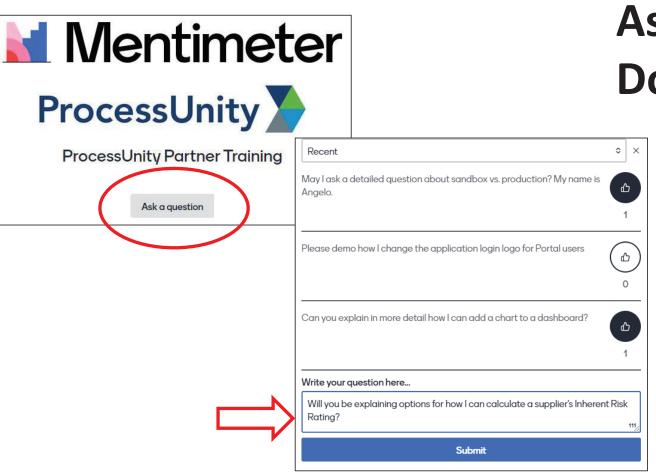


Question 2

- A. Knowledge of **TPRM / GRC** Topics
- B. Experience with Excel & formula-writing
- C. Experience with **report-writing or BI** solutions
- D. Admin experience with **ProcessUnity** platform
- E. Admin experience with other similar platforms

Rate yourself on a scale from 1 to 10





Questions: www.menti.com - 63 11 65

Ask Questions... Don't be Shy!

Types of Questions

- 1. Please explain...
- 2. Can you demonstrate...
- 3. I don't understand...on slide X...
- 4. Please clarify quiz question...
- 5. I have a question (name)...

We will do **live Q&A** when possible, it's just harder with a large Zoom crowd!



Rich GottesmanVP, Product Management

About me

> 10 years at ProcessUnity (July)

✓ Early: Product Management, Pre-Sales, Support, Tech Writing, Training

✓ **Mid**: Customer Success, Customer Implementations, Training

✓ Current: Product Management, Training

Training

- > Built/Led ProcessUnity's public, hands-on training events beginning mid-2016
- ➤ 3 major courses, 3 days each (ADM101, ADM201, REX101) geared for admins
- COVID19 changes everything

Today

- > Brief overview core aspects of the ProcessUnity Platform Starting with Intro
- ➤ Will cover user management, configuration, reporting, workflow, and TPRM topics
- Not hands-on (not enough time) but brief multi-choice interactive quizzes
- "Partner Training 101" (PT101)



Training Objectives

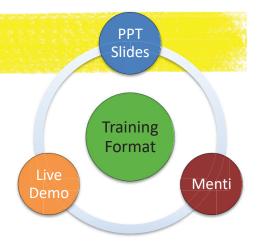
- Introduce the ProcessUnity platform for administrators.
- Provide **brief overviews of all major platform functionality** focused on implementing new solutions.
- Focus on "the art of the possible" even though OOB (pre-configured) solutions exist (e.g. BPC).
- Discuss the core elements of a TPRM and how they are configured.
- Provide additional "deep dive" slides for self-learning.



Format

- 1. Introduction to each topic (PPT)
- 2. Brief demos of functionality in multiple ProcessUnity training environments
- 3. Brief set of quiz questions after each topic to reinforce learning
- **4. Q&A on each topic** Submit guestions via Menti

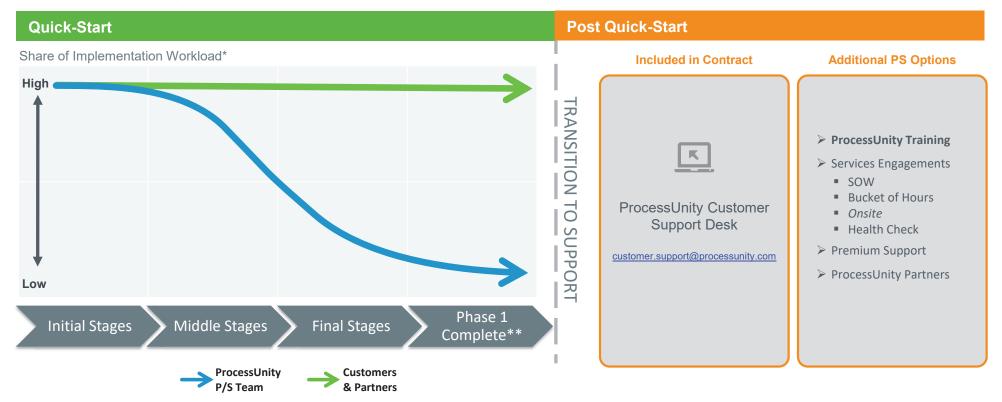
Apply what you've learned in your own sandbox as time permits



Introductory Application Administration PT101

The Enablement Mantra

ProcessUnity's goal is to **enable partners** and **application administrator(s)** to become **ProcessUnity platform experts**. Customer-centric product expertise leads to **lower-cost** implementations and **autonomous** / self-service **expansion and program growth**. Customer quick-start implementation work is focused on **Enablement Workshops**, and training courses allow for **deeper/accelerated experimentation** by learning the core capabilities of the product.



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PT101

Introductory Application Administration PT101

Topics / Agenda

- Topics do not address all Admin areas of ProcessUnity, but all the major areas are covered
- B. More slides than time (may be useful as a reference)
- C. Agenda times only a guide
- D. Q&A via Menti addressed during or after each topic - at logical breakpoints



Est Start	Est Duration	#	Topic
9:00am	30 mins		Introductions / Level Set
9:30am	45 mins	1	Intro to ProcessUnity
10:15am	30 mins	2	User Management / Security / Permissions
10:45am	15 mins		Break
11:00am	30 mins	3	Properties 101
11:30am	30 mins	4	Import Templates
12:00pm	30 mins	5	Calcs, Aggs, and Globals
12:30pm	30 mins		Break / General Q&A
1:00pm	45 mins	6	Expression Writing
1:45pm	45 mins	7	Reports & Dashboards
2:30pm	30 mins	8	Notifications
3:00pm	30 mins	9	Workflow (Buttons & Actions)
3:30pm	15 mins		Break
3:45pm	60 mins	10	Questionnaire Templates, Scoring, Preview
4:45pm	30 mins	11	Assessments, Linked Properties, Portal Walkthrough
5:15pm	15 mins		General Q&A / Parking Lot Items
5:30pm			Survey / Adjourn

Intro to ProcessUnity – A brief intro to ProcessUnity's SaaS platform, how it works, the components of its UI, and an introduction into application administration.



Overview of BPC

Technical Platform Overview

- Platform & Feature Summary
- Instance Types (Prod/Sandbox)

Using ProcessUnity

- **UI & Navigation**
- Object Overview / Subject Areas
- Related Items
- **Documents & Attachments**

Administration 101

- **User Types**
- Admin Responsibilities
- **Application Settings**
- **Branding**
- Colors
- Online Help
- **Platform Limits**

Deep Dive Topics

- Refresh Sandbox
- **Configuration Change Control**
- Backup & Restore
- Nightly Processing
- **Architectural Footnotes**

Demo

- Brief UI Walkthrough
- **Impersonation**
- Search, Edit/Save, Tabs
- **App Admin Settings**



Best Practices Configuration - Overview

Pre-built Solution!

ProcessUnity provides a "Best Practices Configuration (BPC)" implementation of Third-Party Risk Management (TPRM).

- **Prepackaged** with Configurations, Onboarding Processes, Workflow, Reports, Dashboards, Questionnaires.
- > Methodology Guide exists
- User Guide exists

BUT there is **NO** "one size fits all"

- "I need additional fields..."
- "I need to change a report..."
- "I need to edit the Risk Calculation..."
- o "The workflow needs to change..."
- o "I want to build a new dashboard..."

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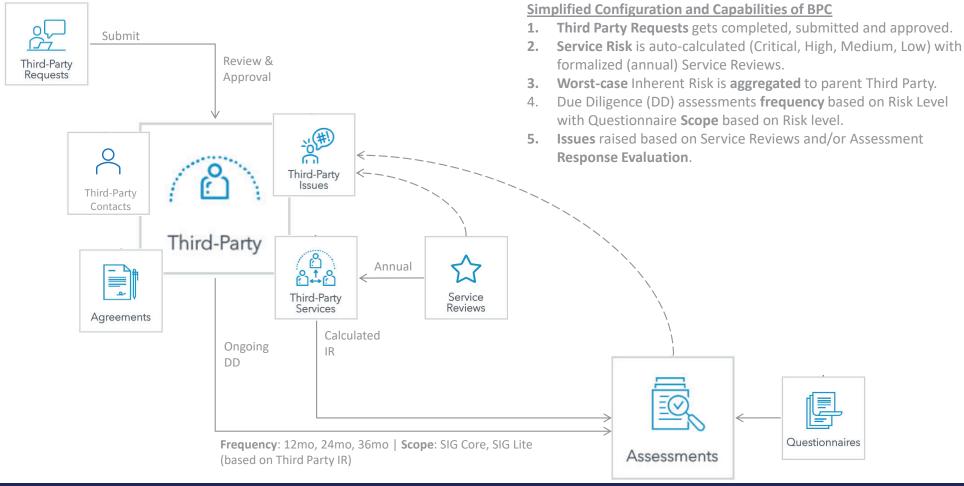
➤ **Good News**: BPC is admin-configurable based on a powerful underlying platform.





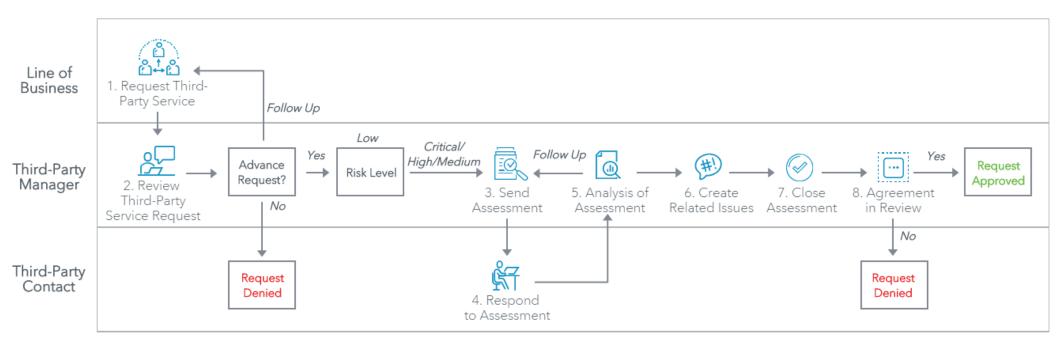
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Best Practices Configuration - Flow



Best Practices Configuration - Flow

TPRM Onboarding Process Flow



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TPRM/BPE is configured based on three end-user personas.

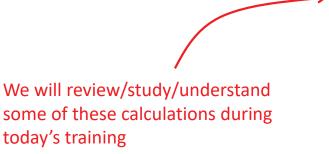
- The above chart shows how the Onboarding workflow is configured
- Other process flows and configuration details are described in the BPC Methodology Guide

13

Best Practices Configuration - IR

The role of Inherent Risk (IR) in TPRM/BPC

- TPRM/BPE is configured to use the calculated IR to determine the assessment scope and frequency
- Robust yet simple TPRM/BPE implementation based on years of implementation and customer experience
- **Everything is configurable**

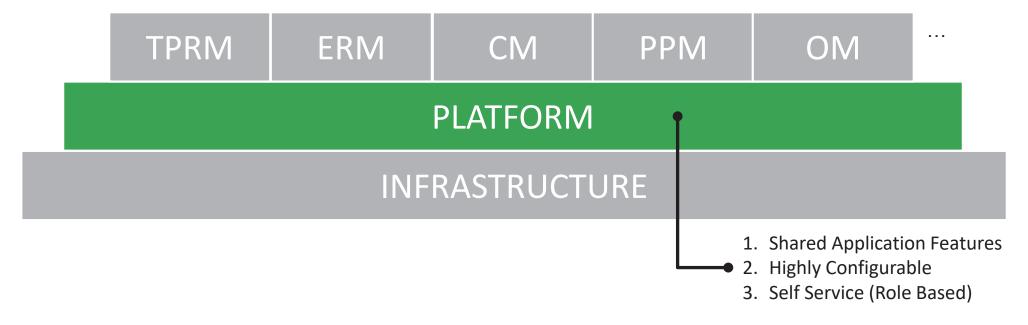




today's training

The ProcessUnity Platform

The ProcessUnity platform is a **rich and flexible set** of application **functions and features** upon which all solutions (e.g. TPRM) are built and scaled – **permissions**, **workflow**, **data management**, **integration**, **reporting** – all which form the backbone of ProcessUnity's **risk management solutions**.



15

Platform Features Summary

General Configuration

- 1. Basic Properties (text, number, date, time, pick)
- 2. Calculated / Aggregate Properties
- 3. Filtered People Pick Lists / Reference Data
- 4. Related Items
- 5. Cascading Pick Lists
- 6. Conditional Color Coding
- 7. Auto-Update Rules
- 8. Validation Rules
- 9. Historical Data Capture
- 10. Track History / Change Log
- 11. Conditional View/Edit
- 12. Application Level Properties
- 13. Properties Usage / Bulk Property Update
- 14. Custom Grids
- 15. Custom Colors / Branding options
- 16. Image Library
- 17. Configuration Change Control

Notification & Workflow

- 1. ProcessUnity Inbox Notifications
- 2. Configurable HTML email Notifications
- 3. Event Types (Triggers)
- 4. Email Notification Text
- 5. Notification Recipients / To | CC | BCC
- 6. Review & Approval
- 7. Custom Buttons and Bulk Report Actions
- 8. Automated Actions

16

Custom Reports

- 1. Context Reports
- 2. Filtering / Run Time Filters
- 3. Adding Calculated Columns
- 4. Adding Conditional Color
- 5. Adding Charts to Reports
- 6. Report Organization
- 7. Grouping / Sorting
- 8. Report Drilldown
- 9. Transpose Feature
- 10. Reporting for Data Extracts

Tools / Add-Ons

- Import Templates
- 2. Microsoft Excel® Connector
- 3. Microsoft Word Connector
- 4. Analytics Database
- 5. External Components
- 6. Third Party Content Connectors / SIG Connector
- 7. Custom Subject Areas
- 8. Single Sign On (SSO) / 2FA
- 9. Lite User Self-Provisioning (LUAP) for SSO
- 10. Automation / PowerShell / Web Services
- 11. Integration Hosting Services
- 12. Configurable Email Gateway
- 13. ProcessUnity Connector

Navigation via Reports

- 1. Reports vs. Subject Areas
- 2. Navigation-Friendly Reports
- 3. Publishing Options
- 4. "Allow Create New" Option
- 5. Simplify User Roles
- 6. Drilldown to underlying data

Dashboards / Analytics

- 1. Custom Reports with Charts
- 2. Context Reporting / Drilldown
- 3. Charts, Gauges, Maps, Tables, Number Boxes
- 4. Personal Dashboards
- 5. Custom (Shared) Dashboards
- 6. Monthly/Weekly Trending / History Reports
- 7. Transposed Reports

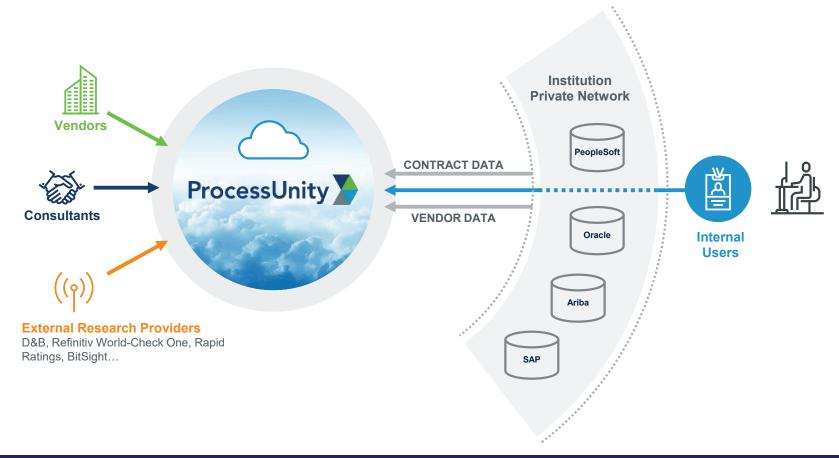
Functions / Expressions

- 1. Function Library
- 2. Application-Level Properties / Global Variables
- 3. Icons / Emojis



Integration & Usage

ProcessUnity's platform supports an **extensive ecosystem** – user types, content providers, customer integrations



17

Instance URLs / Environments

Customers purchase **private instances** in which to host their program. Below are the **instance URLs** (environments) that are provided, with descriptions of what they are used for. All instance names are **unique** across the entire ProcessUnity customer base.

Sandbox

Note: Private Cloud customers will have different URL prefixes (e.g. https://www51...)

https://app.processunity.net/name

- Configuration and content in your production instance will be considered "live" after implementation.
- For internal environments use: https://internal.processunity.net/name

https://app.processunity.net/name-test1

- Safe area used for experimenting, testing, training courses, proof-of-concepts, etc.
- Content can be refreshed from production on demand
 (by admins). Admins can also check-out and check-in → configuration change control.
- Internal: https://internal.processunity.net/name-test1

https://portal.processunity.net/name

- Used for VRM/TPRM
- Environment for vendors (external third parties) to complete questionnaires, etc.
- Essentially a restricted access production URL.
- Internal: https://internal-portal.processunity.net/name

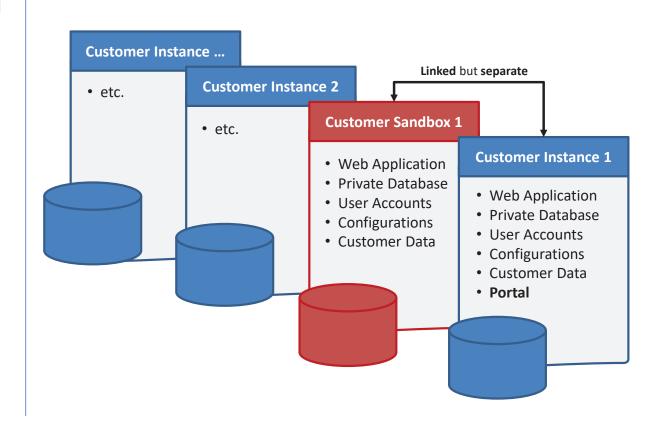
https://app.processunity.net/name-archive

- A read-only copy of a production instance and all its data for future audit purposes.
- Archives can be taken from production (by admins), and managed/restored in the archive instance.
- Internal: https://internal.processunity.net/name-archive

Production

Customer Application Instances

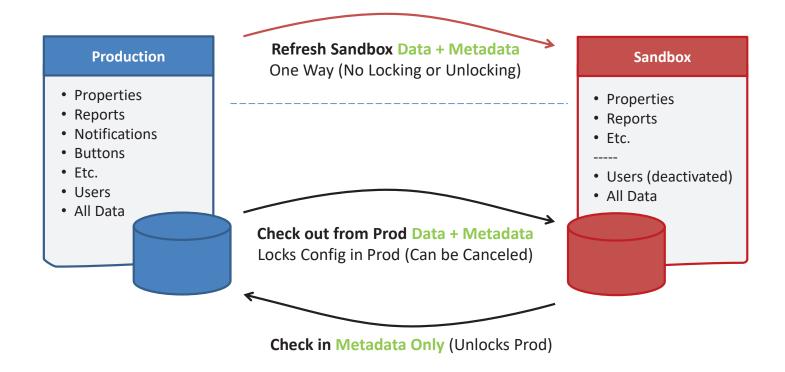
- Instances are environments where all your data and configuration is hosted
- **2. Separate Web Application** for each instance
- Single-Tenant Database for each instance
- Isolated Production and Sandbox instances
- **5. Portal access** via same production instance, but via special URL (TPRM)
- 6. Full Backups Daily with several incremental daily backups / nightly geo-remote backups



19

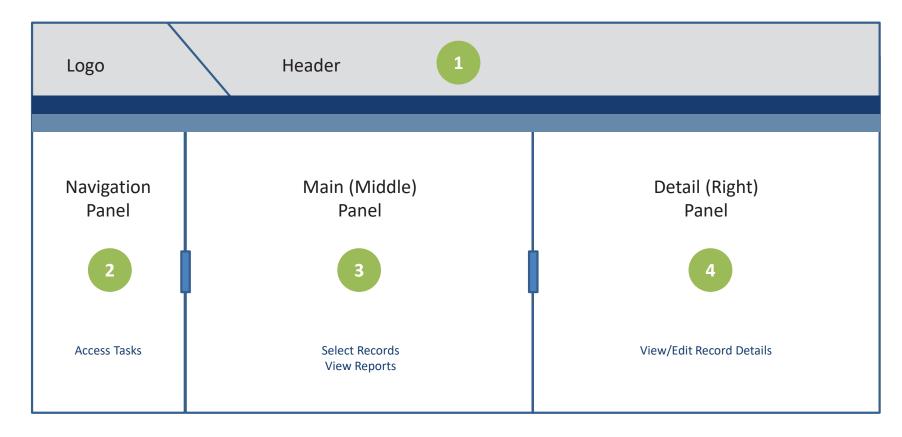
Production & Sandbox Environments

Configuration can be done in Sandbox, tested in Sandbox, then checked back into Production when ready.

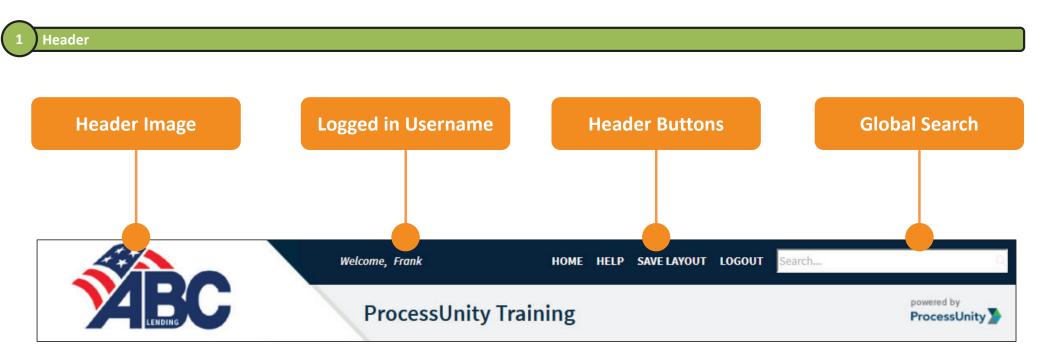


User Interface Components

The ProcessUnity User Interface is made up of **four** areas:



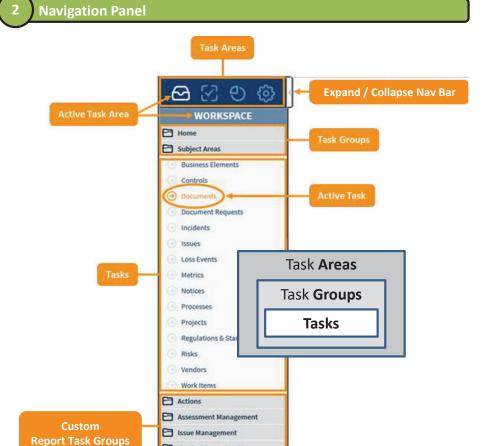
User Interface Components



Administrators are encouraged to "name and brand" their instance.

22

User Interface Components



Main (Middle) Panel



Vendor Management

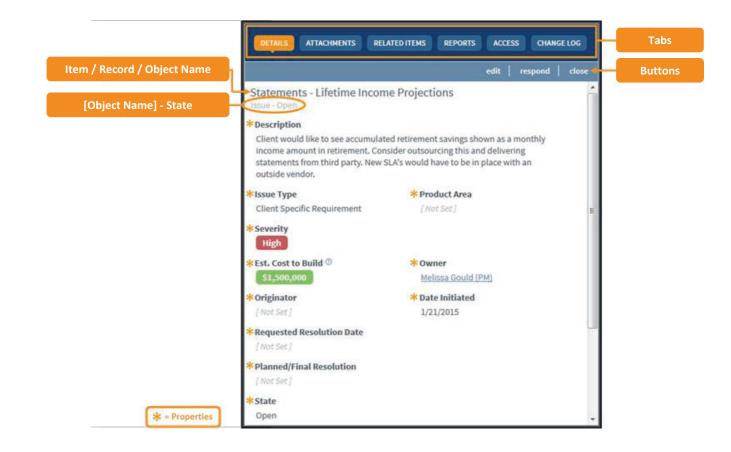
PT101

User Interface Components

4 Detail (Right) Panel

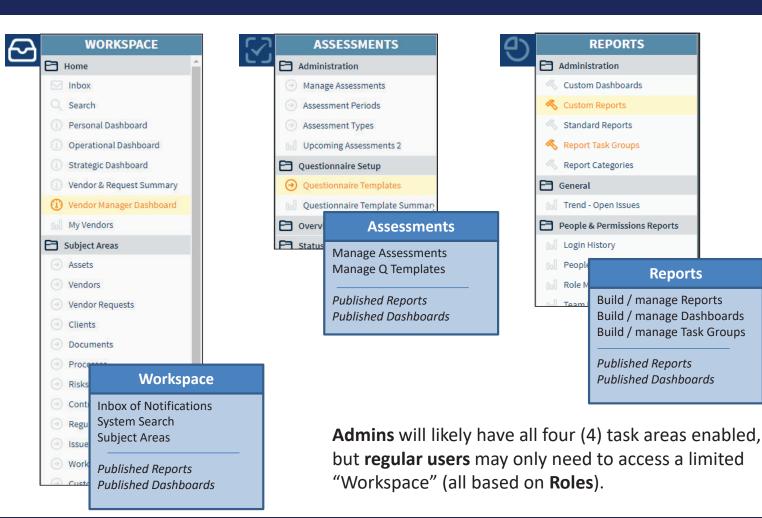
The right panel shows the **details** for the selected item (record).

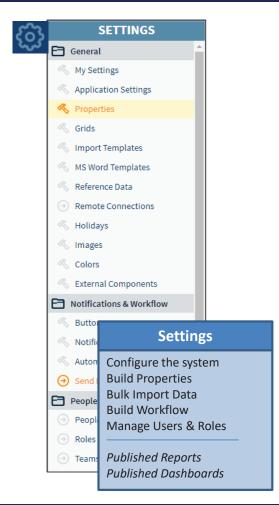
- Details tab has configurable properties (attributes, fields)
- Other tabs provide additional information related to the selected item (record)
- Tab visibility can be controlled via Roles
- Button permissions can be also be configured





Task Area Summary

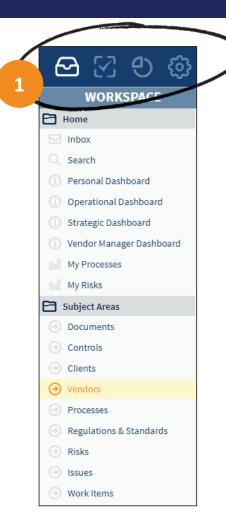


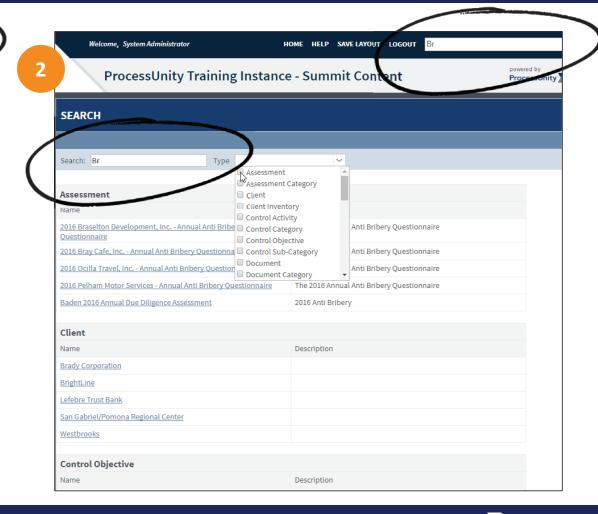


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Navigation & Search

- 1. Task Areas and Subject Areas allow users to quickly navigate data types.
- 2. The Global Search feature allows users to quickly access data across subject areas.





Objects, Records (Items), Properties



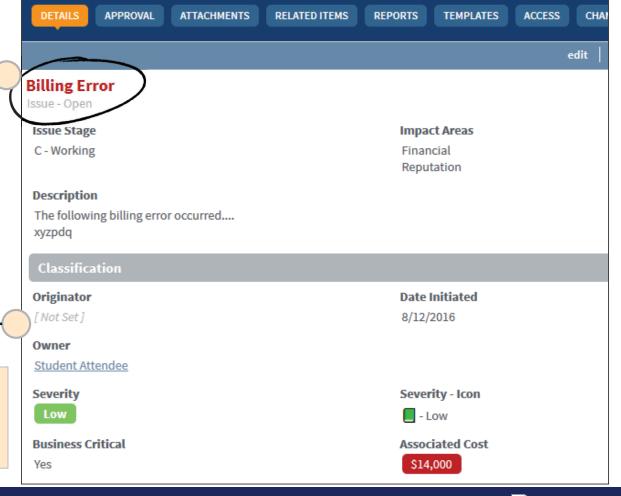
Line 1: The record's name: [Name]

Line 2: Object name - [State]

All data in ProcessUnity is stored in an **object model**, where the **object name** represents the *table* where it is found. Each record contains several properties (*fields*). Some key standard (locked) properties are:

- [Name] the record's name
- [Description] optional text describing the record
- [External ID] a key identifier, generally unique
- [State] the status of the record

Properties are shown on an object's **Details tab**, and are best presented with clear names, tooltips, and grouped in meaningful **section headers**.





PT101

Subject Areas

Subject Areas in ProcessUnity are the building blocks (objects) of a ProcessUnity risk management solution and are often mixed/matched and configured to address custom requirements or scale existing programs.

Subject Area / Object	Enables Customers to
Business Elements	Define and evaluate risks for key business elements that cannot be categorized by an existing subject area.
Certifications	Issue and monitor responses to scheduled and ad hoc requests for certification by internal and external business participants.
Controls	Define, maintain, test, and evaluate coverage of internal business controls and IT controls, and capture and remediate deficiencies.
Clients	Expressly used for Offer Management, represents the institutions that acquire and use products/services, provides a sub-client hierarchy, and enables maintenance of CRM-like profiles. Also provides capturing of one or more client inventories (inventories of Services).
Documents	Maintain a centralized repository of file attachments, or URL-accessible links. Files can be copied/pasted elsewhere.
Document Requests	Manage and fulfill requests for documentation and other information.
Financial Accounts	Capture general ledger accounts for compliance support.
Incidents	Manage the reporting, tracking, and resolution of events related to key regulatory and business governance requirements.



Subject Areas – Continued

...continued

	Subject Area / Object	Enables Customers to
	Issues	Identify, assign, and track the resolution of current concerns or potential problems related to some aspect of a business's risk and compliance management activities.
	Loss Events	Track events that results in a financial loss (or gain) to the business, resulting in a negative change in the status of the business's assets, or an increase in the business's liabilities.
\overline{C}	Metrics	Capture performance indicators and data to measure any organizational aspect of risk management.
	Notices	Communicate with one or more individuals to provide information, such as bulletin-board postings, organizational or team announcements, or details about upcoming service offerings.
	Organization	Identify and document functional elements of a business such as departments or groups and divide them into organizational units.
	Policies & Procedures	Maintain centralized repository of policy and procedure documents, which are used to help guide operations toward accepted business strategies and objectives.
	Processes	Document and maintain related sets of steps or activities that a business carries out to achieve its various objectives.
	Projects	Monitor formal activities (such as corrective action or business process management) that have assigned responsibility, start/end dates, status, and ongoing dialog.
	Reference Controls	Maintain a repository for recommended internal business controls that can be copied and modified to create a new control.





Subject Areas – Continued

...continued

	Subject Area / Object	Enables Customers to
C	Regulations & Standards	Identify and document the provisions defined by external regulatory and standards bodies, as well as by internal corporate management, that govern the business's behavior. In TPRM, provisions can be linked to questions.
	Risks	A hierarchical structure of a company's risk register, used to identify and document potential risks to an organization to address regulatory compliance purposes, and allow identification of the probability, impact, and formulation of residual risk based on Controls.
	Services	A hierarchical catalog of products, services, service variations, and service metrics that make up the product/service offering of any business. Services are exclusively used for ProcessUnity's Offer Management solution and are used as the core elements of Client Inventories (Plans) for client data.
C	User Defined Objects (10)	Add-on objects that can be integrated into customer instances to extend existing implementations. These are subject area grids, renamed and configured based on customer requirements, and can be linked to any other object for custom properties, workflow, notifications, permissions, and reporting.
	Vendors	Provides a hierarchical storage structure to capture and maintain a vendors / suppliers / service providers and their related services / engagements / agreements / facilities / fourth parties that represent potential risk to the organization and require periodic due diligence. A Vendor Portal is provided to external users to access questionnaires and related content.
9	Vendor Requests	Used in TPRM environment to optionally allow LOB (line of business) users to request a new vendor, supplier, or service. Once approved, workflow can be configured to create object(s) in the Vendor subject area.
C	Vendor Custom Objects (3)	Used to extend the Vendor subject area with child objects at the Vendor and/or Vendor Service level.
	Work Items	Monitor the tasks related to regular risk mitigation, compliance management, or product/service catalog duties.

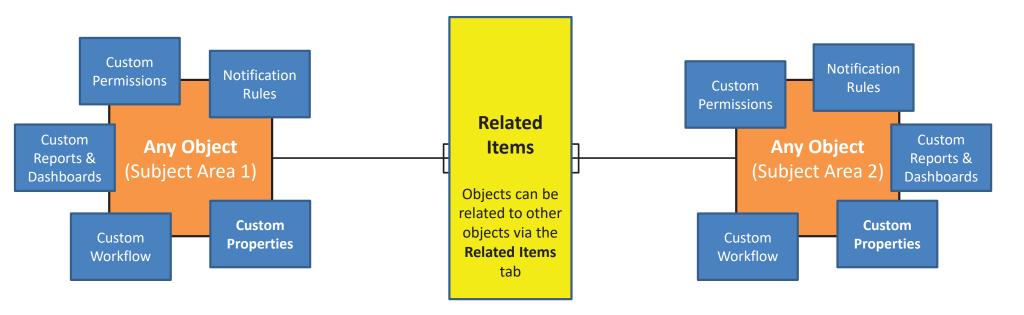




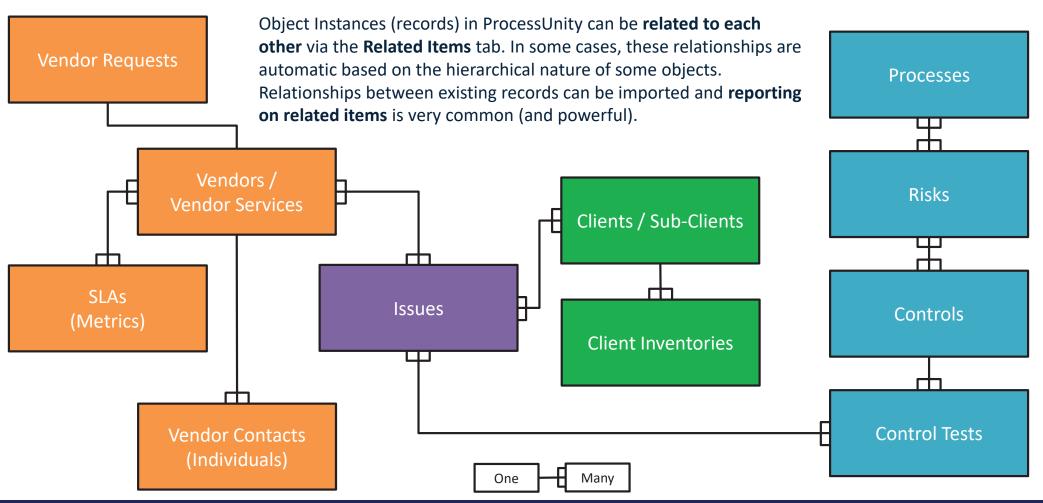


Relationships between Configurable Objects

Most all objects in ProcessUnity offer **configurable components** in order to meet customer needs. In many cases, objects can even be **renamed upon request** (by contacting Customer Support). The **Related Items tab** is used to link together records from object to another. Most object types in ProcessUnity can be related to each other, and desired linkages can be configured via **Roles**.



Related Items

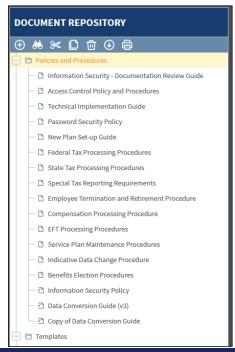


Documents / Attachments

The ProcessUnity platform supports uploaded documentation/files/attachments in several ways:

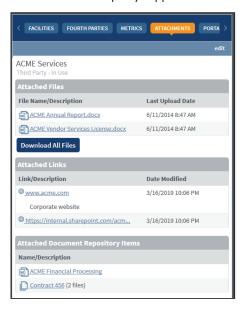
Document Repository

- ✓ Formal Subject Area
- ✓ Configurable tree structure
- ✓ Docs, Managed Docs, Links
- ✓ Support for Custom Properties



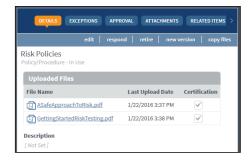
Attachment Tabs

- ✓ Most every object has an Attachments tab
- ✓ Straight file uploads, links, or links to Doc Repository documents
- ✓ Possible to add file comments
- ✓ No Custom Property support



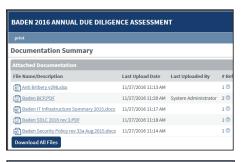
Uploaded Files (Details Tabs)

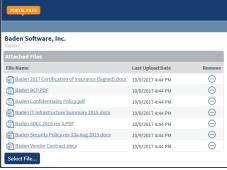
- ✓ Direct file uploads to Details tab
- ✓ Only some objects support this (Policies & Procedures, Agreements)
- ✓ No support for file comments
- ✓ No Custom Property support



Questionnaires / Portal

- √ Vendor uploads to Documentation tab of Questionnaire
- ✓ Link uploaded files to questions
- ✓ No support for comments, properties
- ✓ Files Task / Shared Portal Files



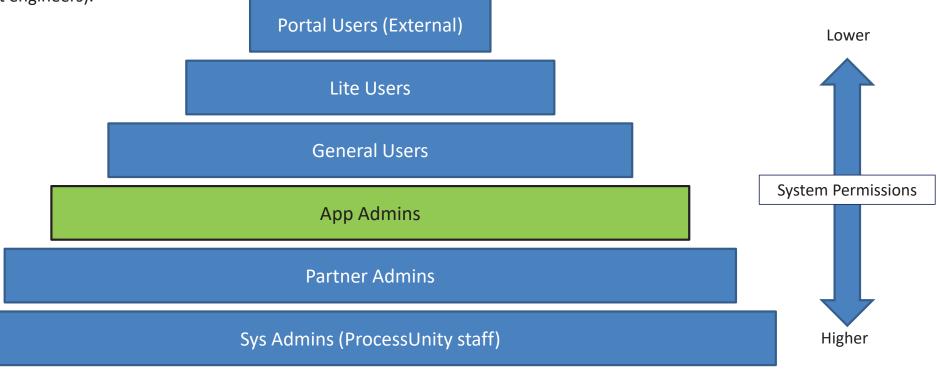






Administrators and User Types

An **Application Administrator** is responsible for the setup, configuration, and maintenance of their organization's instance of the ProcessUnity application. Any user account can be assigned to a role that has been granted a role of **Application Administrator**, which is a broad permission that enables the user to manage and configure most application features and functions. Certain configuration requires **System Administrator** assistance (i.e. your ProcessUnity implementation lead or ProcessUnity customer support engineers).



34

App Admin Responsibilities

Overview

- Critical role for a successful implementation
- Ongoing management of your ProcessUnity program
- Power users of the tool
- Take ownership of configuration / on-going maintenance

Attributes

- Dedicated time for program / learning ProcessUnity
- Proficient with Browser apps
- Comfort with Excel™
- Comfort with formula writing / expressions
- Empowered / Organized / Detail Oriented

Responsibilities

- Participate in all enablement sessions with ProcessUnity P/S team
- Configuration of your program
- General administration / user management
- Tier 1 support for user community
- Primary contact for ProcessUnity Support team





App Settings Menu

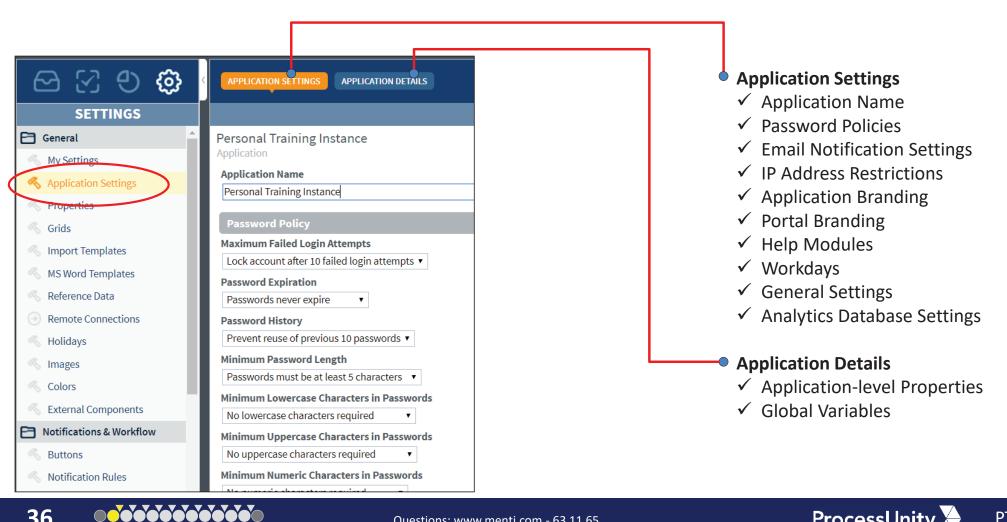
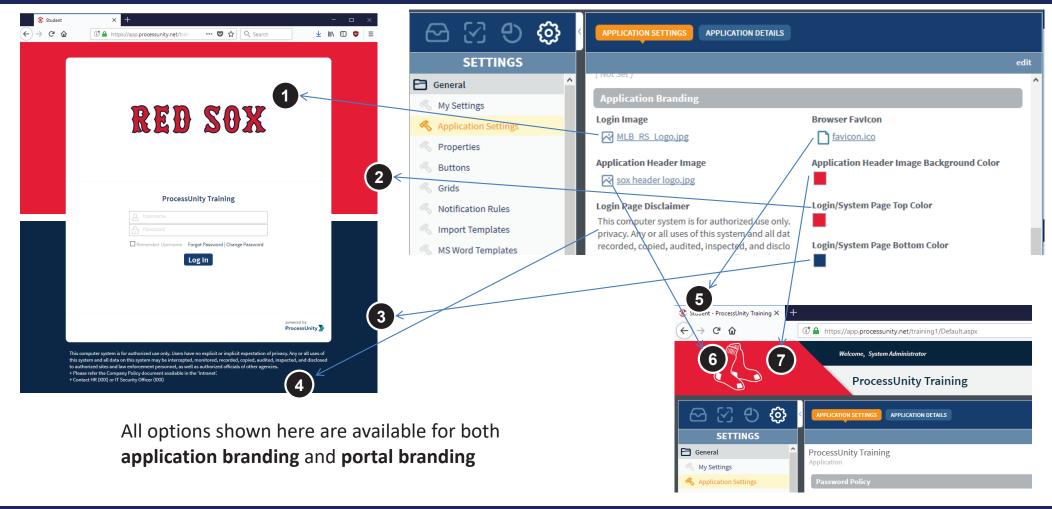


Image Branding



Custom Colors

ProcessUnity allows administrators to create and name their own custom colors (e.g. corporate colors) based on each color's "hex string" and then use these colors in specific areas across the system.





Available web-friendly colors (and related hex strings) can be found online, such as:

https://htmlcolorcodes.com/

COLORS

Name

Corporate Green

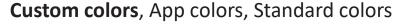
Corporate Grey

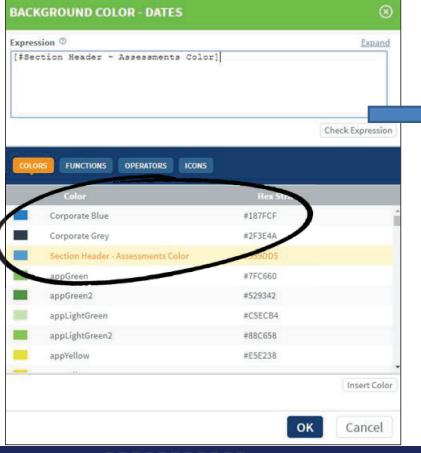
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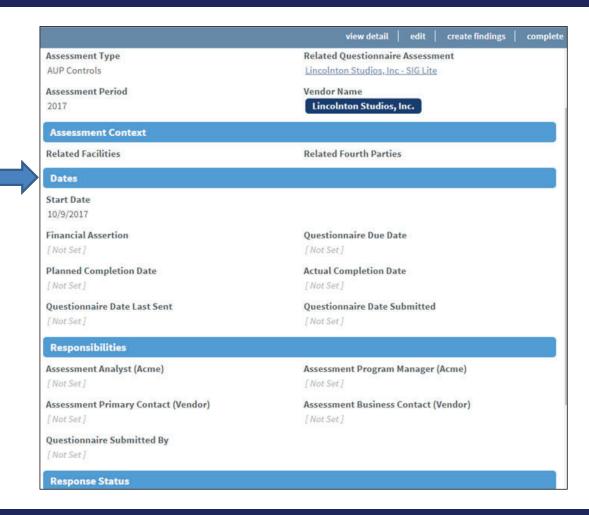
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Applying Custom Colors







Platform Limits

Platform limits are in place and enforced to ensure system performance is not negatively impacted and to prevent execution timeouts from occurring. Limits may change over time. Please check Online Help Center for more information.

Cus	Custom Properties	
#	Item	Limit
1	Max Properties – Instance	1,000
2	Max Properties – Object	400
3	Max Calculated Properties – Object	150
4	Max Aggregate Properties – Object	50
5	Max Property Track Changes – Object	50

Custom Notification Rules		
#	Item	Limit
6	Max Notifications per Object	20
7	Max Notifications per Instance	200

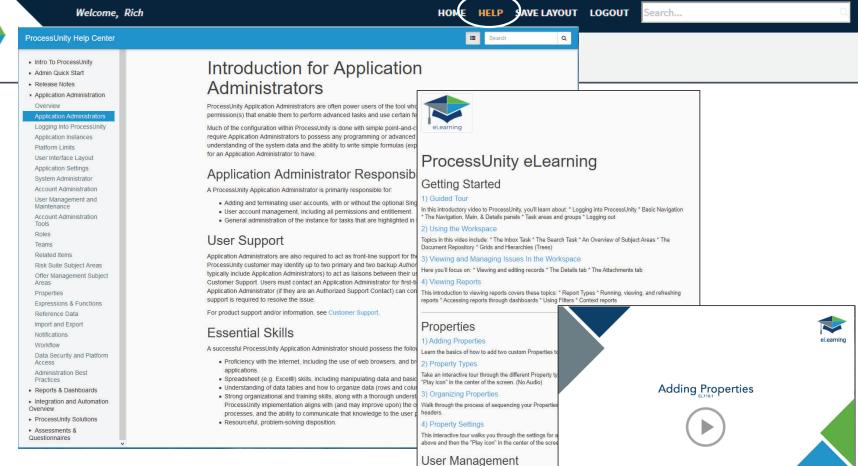
Data Import / Document Storage		
#	Item	Limit
8	Maximum Import Row Count	20,000
9	Max File Upload /Import Size	20 MB
10	Max Document Size / Attachment	20 MB

Data Export / Custom Reporting		
#	Item	Limit
11	Max Custom Report Columns	N/A
12	Max Calculated Columns	20 Text, 20 Num, 20 Date)
13	Max Cells for Onscreen Report	20,000 cells
14	Max # Rows / Bytes for Export	500,000 rows / 50MB

Online Help Center



- Requires active username/pw
- Accessed via Help button
- **Mostly Admin** Help Content
- **eLearning** Videos
- Release Notes



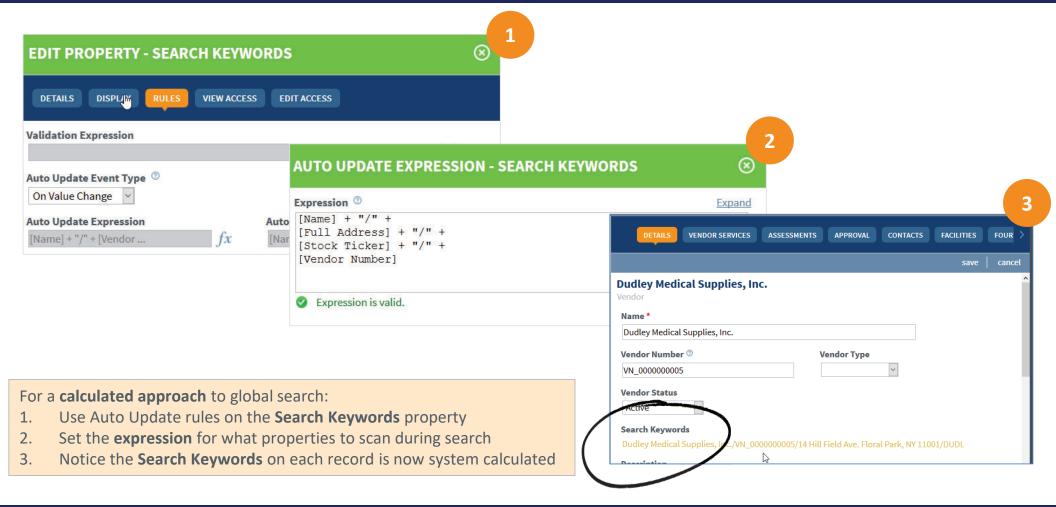


Additional Topics for Deep Dive

As time permits, the following slides provide deep-dive review of many other Introductory Platform topics.

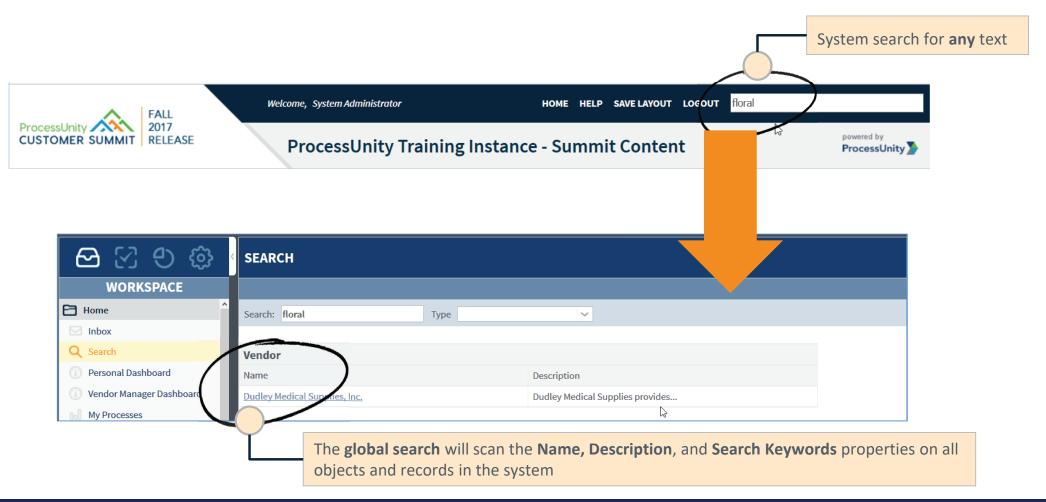
#	Торіс	Note
1	Global Search Keywords	Configurable methods to making Global Search more powerful.
2	Refresh Sandbox	Ability for admins to refresh sandbox content from production on-demand.
3	Configuration Change Control (Check-out / Check-in)	Checking Production out, configuring in Sandbox, checking back in.
4	Backup & Restore	Details about backup retention schedule and requesting restore.
5	Region-Targeted Nightly Processing	Azure regions and timeframes for nightly processing.
6	Instance Nightly Jobs	The various operations that run against instance data every night / processing sequence.
7	Architectural Footnotes	Architectural details / regional differences / languages / mobile usage.

Global Search - Keywords



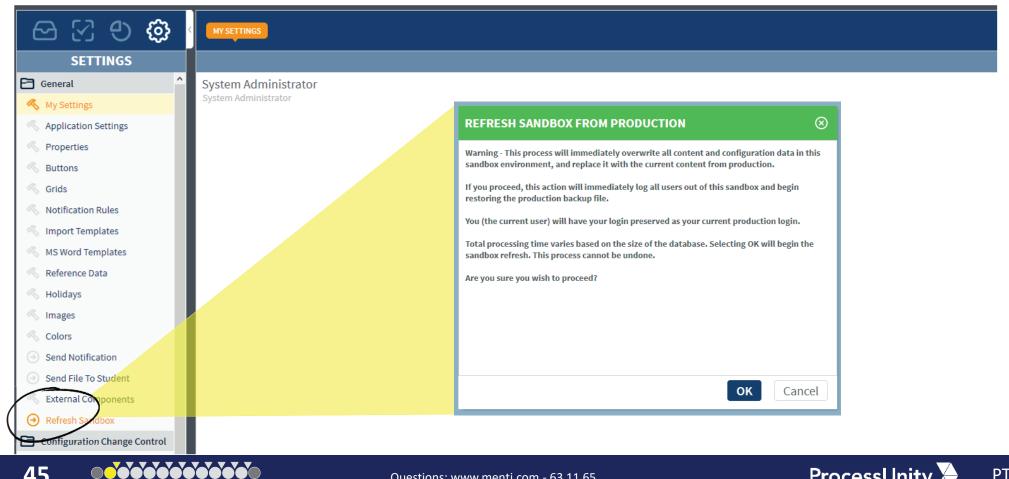
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Global Search - Keywords



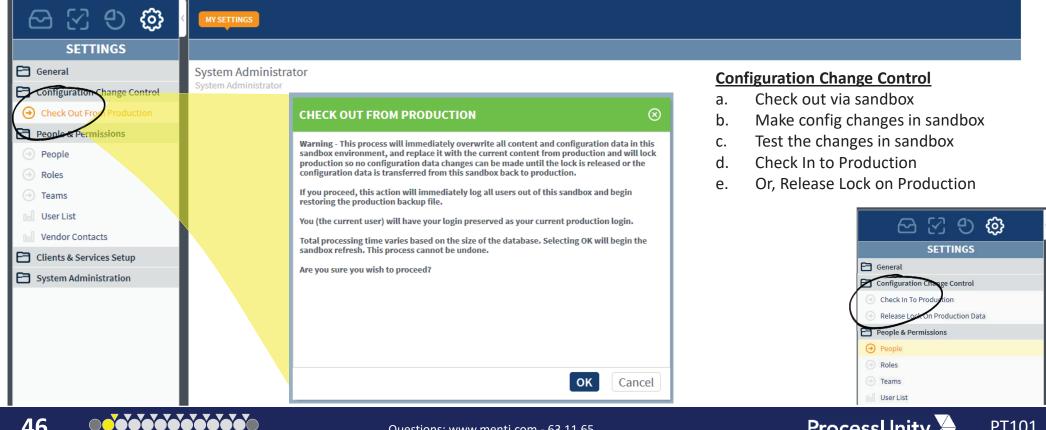
Refresh Sandbox

From the sandbox instance, "Refresh Sandbox" is available for administrators – a simple **one-way copy** of prod.



Configuration Change Control

From the sandbox, "Check Out From Production" is available for administrators to make/test config changes before going live with the changes. Note that several configuration areas in Prod environment will be locked until check-in.



Backup & Restore

Backup Retention Schedule

- Every Hour Incremental backups are performed hourly.
- Every Night Full backups are performed nightly.
- **Nightly Backups** Nightly backups are retained for 30 days
- Monthly Backups Backups from the first of the month are kept for 12 months.
- Yearly Backups Backups from the first of the year are kept thru contract length.

Retention Example

For a customer who entered contract in 2017, the following backups would be available (assume today is 1/17/2020):

2018: Jan 1

2019: Jan 1, Feb 1, Mar 1, Apr 1, May 1, Jun 1, Jul 1, Aug 1, Sep 1, Oct 1, Nov 1, Dec 1,

Dec 16,17,18,19,20,21,22,23,24,25,26,27,28,29,30,31

2020: Jan 1,2,3,4,5,6,7,8,9,10,11,12,13,14,15,16,17

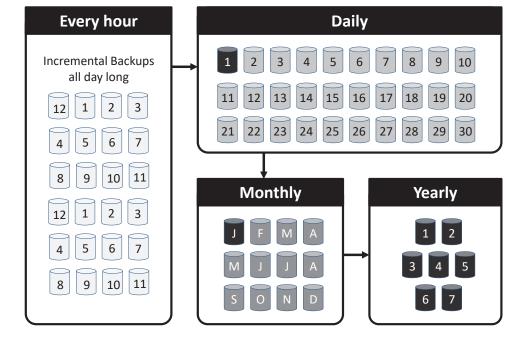
Restoring Backups

Reserved for catastrophic recovery of production data, accidental deletion, or for disaster recovery tests.

- Restores requested by contacting Customer Support.
- Backups are generally restored to a sandbox instance where existing production content can remain active and allowing for selective content restoration.
- For best results, contact Support ASAP if restore may be needed.

Encryption Level

- At rest: AFS 256 bit
- In transit (site to site): HTTPS/TLS/SSL 2048 bit



Region-Targeted Nightly Processing

Leveraging Microsoft Azure's regional hosting facilities, customer environments automatically run **nightly jobs** based on the instance's **region** of deployment:

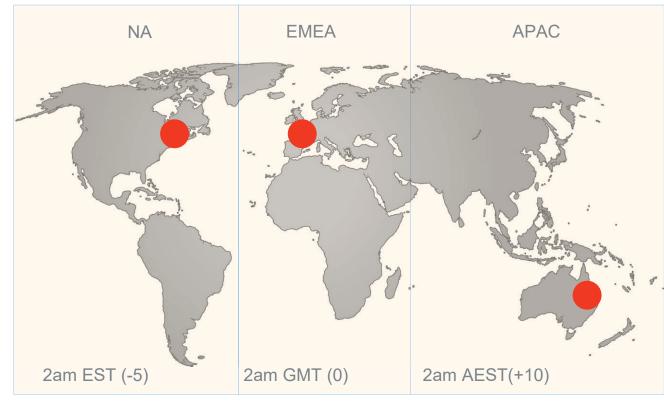
- North America
- EMEA
- APAC

These include activities such as:

- Nightly recalculations (date based calcs)
- Nightly email notifications
- Nightly workflow actions
- Nightly integration jobs
- Nightly historical data capture (trend data)
- Nightly user account deactivation
- Nightly backups (full backup)

...and more

Nightly jobs begin at 2am in regional window



Nightly Processing

Regional Time Task	
3.33.	10
~ 12:10am Regional backups begin sequentially (exact time varies)	9 🗡
~ 1:20am Integration / Connectors Refresh begins	7 6
~ 2:00am Instance Nightly Jobs (described next slide)	
~ 3:00am AnalyticsDB Refresh begins	
TBD Hosted Integration Services (Customer-defined timeframe))

- 1. Instances are run in a specific sequence for all tasks,
- 2. First all Prod instances are run, then all Sandbox instances are next
- 3. Shown above is the scheduled starting time. Duration varies based on number of instances, amount of data, amount of nightly jobs, etc.

Instance Nightly Jobs

Do daily full DB backups happen first?

- 1 Refresh **Dynamic Calcs on Properties** (TODAY, NOW)
- 2 Send Certification Requests
- 3 Process Nightly Automated Actions
- 4 Process Nightly Auto-Update Rules
- 5 Send Nightly **Custom Notifications**
- 6 Deactivate **User Accounts** (based on Auto-Deactivate Date on Individuals)
- 7 Processing of **Historical Data Capture** (Weekly / Monthly)
- 8 Purge **Audit Logs**

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Architectural / Platform Footnotes

Backup and Recovery

- **Backups** transactional backups occur in a rolling 30 days.
- Recovery contact Customer Support with date/time of issue to discuss immediate restore strategies

Localization / Multi-Language Support / Time Zones

- Date Formats Will follow browser settings / can be overridden. Dates stored in UTC and converted.
- **Time Zones** Set your instance time zone for dynamic calculations (TODAY, NOW).
- **Nightly Processing** Regional timeframe for nightly processing.
- Languages Unicode compliant (all character sets). Standard Buttons in English. Multi-language options soon.
- Numeric Expression Writing regardless of regional configuration, use US-based formats for numbers.

Mobile Device Support

- Not Optimized Not currently optimized for responsive design on mobile (UI, right click, hovers, trees, nav).
- **No Mobile App** ProcessUnity does not currently have a mobile app.



- ✓ Q&A
- ✓ Live Product Demo
- ✓ Quiz

Demo

- Brief UI Walkthrough
- Impersonation
- Search, Edit/Save, Tabs
- App Admin Settings

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- Customers who run multiple programs (solutions) must implement them on multiple instances.
 - A. True
 - B. False
- Subject Areas are essentially tables that form the building blocks of a risk management solution in ProcessUnity.
 - A. True
 - B. False
- Customer Support can rename Subject Areas and related object names (upon request) to suit your vocabulary.
 - A. True
 - B. False

53

- To determine which Issues are assigned to a Vendor, you can:
 - A. Vendor Subject Area, find vendor, click Related Items tab for Issues
 - B. Issues Subject Area, find issue, click Related Items tab for Vendors.
 - C. Both A and B
- Password policies can be configured differently for each application user.
 - A. True
 - B. False
- Sys Admins (ProcessUnity Staff with userids) can access customer data:
 - A. Only on weekends and evenings (non-holidays).
 - B. Any time they wish.
 - C. Only when customers enable the "Sys Admin Access" option.