



SAI360

Risk | Learning | EHS | Sustainability

SAI360 Academy Course Catalog Compliance360

August 2022



Table of Contents

- 1. SAI360 ACADEMY COURSE CATALOG..... 4
 - 1.1 Introduction..... 4
 - 1.2 Course offerings..... 4
 - 1.3 Learning Formats..... 4
 - 1.4 Registration..... 5
 - 1.5 Contact information 5
- 2. BASIC C360 INTRODUCTION TRAINING..... 6
 - 2.1 Introduction to C360 6
- 3. ADMINISTRATOR TRAINING PROGRAM 7
 - 3.1 Basic System Administrator Training 7
 - 3.2 Basic System Administrator C360 Reporting (Reporting Essentials)..... 9
 - 3.3 Advanced System Administrator Training 11
 - 3.4 Reporting and Data Visualization Training..... 13

1. SAI360 ACADEMY COURSE CATALOG

1.1 Introduction

Training is a key part of any C360 implementation. With training from SAI360 Academy, you ensure that you maximize the success of your implementation, and your employees will be more productive and efficient from the beginning. **Our common objective is a successful implementation and true embedding of our solution in your organization.**

This course catalog gives you information on all the C360 courses offered by SAI360 Academy. To find the right course for your needs, several aspects need to be taken into consideration: the role of the attendees, whether certification is required and which learning format is preferred. If you have any questions or would like to speak to an educational advisor, please contact SAI360 Academy directly at academy@sai360.com.

1.2 Course offerings

The courses offered are divided into the following categories:

- Basic System Administration courses
- Advanced Administrator training

An overview of each course is available from page 6 onwards.

1.3 Learning Formats

We understand for business needs: you are looking for well-educated professionals, but they often must be educated in a limited time frame and in a cost-effective way. Therefore, SAI360 Academy offers you a variety of learning formats:

- **Instructor-led training (ILT):**
These courses take place in a classroom environment at a SAI360 location or on-site at the customer. We schedule regular open roster courses and dedicated training sessions on-demand. These are supported by eLearning and offline assignments.
- **Virtual Instructor-led training (VILT):**
These courses are a blend of live virtual classroom sessions, eLearning and offline assignments.
- **eLearning (EL):**
These courses are interactive eLearning modules which may include supporting offline material. All eLearning courses are hosted in the SAI360 Learning Center which can be accessed 24/7 from any computer with internet access.

On request, all tracks and courses can be personalized for an optimal fit with your training requirements via a dedicated organization session.

1.4 Registration

There are several ways to register for a SAI360 course:

- Contact your SAI360 Account Manager
- Send an email to: academy@sai360.com

In case of an Open Roster course, the participant will receive a confirmation of registration within a few working days and an invitation with further details about the training location approx. five (5) working days before the start of the course. If the desired course is fully booked, the SAI360 Academy will contact the participant to reschedule their participation. A minimum for a fully booked course is 4 attendees.

In case of an eLearning course, the login details to the Academy Learning Center will be sent via email to the participant(s).

Cancellation policy

Cancellations must always be in writing, at which the cancellation date will be the date of receipt of the written cancellation by SAI360 Academy.

In the event of an Open Roster Course, the cancellation costs will be a percentage of the course price, namely:

- Up to and inclusive twenty (20) working days before start of the course: 0%.
- Twenty (20) up to and inclusive ten (10) working days before start of the course: 50%.
- Less than ten (10) working days before start of the course: 100%.

You can substitute a participant enrolled for a course by another person, if this has been notified to SAI360 Academy before the start of the course. Such a replacement will not result in additional costs.

SAI360 Academy reserves the right to cancel course dates due to insufficient enrollment. Participants will be notified of cancellations within seven calendar days of the course start date. If a course is cancelled for any reason by SAI360, any pre-paid registration fees will be refunded. SAI360 Academy is not responsible for airline penalties related to the cancellation of SAI360 courses or events. Please be aware of the airline restrictions regarding non-refundable airline tickets when purchasing an airline ticket. The same cancellation policies apply for dedicated groups.

1.5 Contact information

For more information on our learning activities, contact your SAI360 Account Manager or contact SAI360 Academy directly: academy@sai360.com

2. BASIC C360 INTRODUCTION TRAINING

SAI360 University (Academy) offers a basic eLearning course as self-study introduction to its further training programs.

2.1 Introduction to C360

This course is an overview of how the application supports your C360 business processes.

Introduction to C360	
Target Audience	Professional users, all administrators
Prerequisites	<p>For best learning results before attending this course, students must have completed the following courses:</p> <ul style="list-style-type: none"> • Understanding of GRC processes within their organization • Understanding of English (materials are in English) • Level of competence as a system user
Format	eLearning course (available in the Learning Center)
Duration	90 minutes
Learning Objectives	<p>After completing this course, students will be able to:</p> <ul style="list-style-type: none"> • Navigate in the application • View your pending action items and announcements • Understand the terminology used in the application • Create an object • Configure a form • Create a new field • Understand the workflow process • Generate a basic report

3. ADMINISTRATOR TRAINING PROGRAM

SAI360 Academy offers training programs for administrators and designers:

- The administrator training program is focused on managing the existing functional configuration of the application
- The designer training program is focused on implementing functional changes to the existing configuration of the application

3.1 Basic System Administrator Training

This course explains functionalities of the Compliance 360 application that are required to perform the basic administrator tasks. The course covers how the Administrator can support system users and extend the use of the application within the organization. It will emphasize developing a working knowledge of the overall Compliance 360 application and the administration duties for the System Administrator role.

Basic System Administrator Training	
Target Audience	The target audience of this course are dedicated administrators with a pre-knowledge of module solution capabilities.
Prerequisites	<p>For best learning results before attending this course, students must have completed the following courses:</p> <ul style="list-style-type: none"> • completed the course Introduction to C360 • a high-level knowledge of how Compliance 360 powered by SAI360 is being used to address business needs within your organization <p>* Please note: Sessions are fast-paced and hands-on course covering reporting system administration topics only. Maintaining a reasonable pace is required to ensure a complete review of all quality content and the materials presented.</p>
Skill Level	<ul style="list-style-type: none"> • Working knowledge of Microsoft Office basics (Excel/Word) • basic understanding of organization's implemented solution(s) • basic understanding of business processes • basic understanding of design and formatting (tech-savvy), • basic report development understanding, and fluent in English written and oral.
Format	(Virtual) Classroom Training (maximum of 8 trainees)
Duration	<p>4 days (4 hours per day)</p> <p>Times (Time zones):</p> <ul style="list-style-type: none"> • 10:00 a.m. - 2:00 p.m. Pacific Time • 11:00 a.m. - 3:00 p.m. Mountain Time • 12:00 p.m. - 4:00 p.m. Central Time • 1:00 p.m. - 5:00 p.m. Eastern Time
Learning Objectives	<ul style="list-style-type: none"> • Role and Responsibilities of the C360Administrator • Understand the overall structure of the application • Understand terminology specific to the application • Understand fundamental concepts of security

	<ul style="list-style-type: none"> • Understand the concepts of levels of user • Add, modify, and deactivate user accounts • Understand how to work with workflow templates • Understand how to manage the basics of forms configuration and other to level maintenance areas • Understand folder maintenance and security • Understand the basic of report templates and generating reports quickly • Understand basic dashboard techniques • Other available support resources
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Session Agenda

Day 1

Topic
Introductions and Agenda Review
Expectations of Compliance 360 System Administrators
General Navigation, Modules Overview, and Application Capabilities
Security Model Overview
Employee Management Exercise

Day 2

Topic
Previous Day Review
General Maintenance Functions
Basic Module Forms Configuration Overview
Basic Module Forms Configuration Exercises

Day 3

Topic
Complete Module Forms Configuration Exercises
Workflow Template Overview
Workflow Template Exercises

Day 4

Topic
Complete Workflow Template Exercises
Reporting Foundations Overview
Reporting Foundations Exercises
Home Page Tabs

3.2 Basic System Administrator C360 Reporting (Reporting Essentials)

This course explores standard reporting and analytics capabilities of the Compliance 360 application available within the web app. *Note:* this course does not cover report designer tasks like building / updating the pre-configured reports using Report Layout Designer (and/or Power BI).

Basic System Administrator C360 Reporting (Reporting Essentials)	
Target Audience	Professional users, dedicated administrators
Prerequisites	<p>For best learning results before attending this course, students must have completed the following courses:</p> <ul style="list-style-type: none"> • Introduction to SAI360 (formerly C360) <p>*Please note: Sessions are fast-paced and hands-on course covering reporting system administration topics only. Maintaining a reasonable pace is required to ensure a complete review of all quality content and the materials presented.</p>
Skills Level Recommendation:	<p>For best learning results before attending this course, students must have</p> <ul style="list-style-type: none"> • Working knowledge of Microsoft Office basics (Excel/Word) • basic understanding of organization's implemented solution(s) • basic understanding of business processes, basic understanding of design and formatting (tech-savvy) • basic report development understanding, and fluent in English written and oral •
Format	(Virtual) Classroom Training (maximum of 8 trainees)
Duration	<p>0.5 Day (4 hours)</p> <p>Times (Time zones):</p> <ul style="list-style-type: none"> • 10:00 a.m. - 12:00 p.m. Pacific Time • 11:00 a.m. - 1:00 p.m. Mountain Time • 12:00 p.m. - 2:00 p.m. Central Time • 1:00 p.m. - 3:00 p.m. Eastern Time
Learning Objectives	<p>After completing this course, students will be able to:</p> <ul style="list-style-type: none"> • C360 reporting foundations • manage reports folder structure and security • understand reports library, modification of report templates and how to generate basic reports for daily needs • understand available report formats • understand how to schedule and share reports • create basic Dashboards for End-Users and C-suite team members

Session Agenda

Day 1

Topic
Reporting Foundations Overview
Getting Started - Report Preparation
Reports Module Design
Report Layouts or Types



Report Template Wizard
Reports and Creating New Reports
Reporting Foundations Exercises
Home Page Tabs
Your Resources

3.3 Advanced System Administrator Training

This course explains functionalities of the Compliance 360 application that are required to maintain and configure the C360 application with optimum organization and knowledge.

Advanced System Administrator Training	
Target Audience	The target audience of this course are dedicated and seasoned administrators
Prerequisites	<p>For best learning results before attending this course, students must have completed the following courses:</p> <ul style="list-style-type: none"> • Introduction to C360 • C360 Basic System Administrator Standard Reporting • six months experience (or equivalent) actively administering aspects of the Compliance 360 application powered by SAI360 • foundation level understanding of the concepts of security, workflow templates, and modules used by your company • understanding of your company's business processes and how Compliance 360 powered by SAI360 is currently leveraged • IT background or experience with enterprise applications <p>* Please note: Sessions are fast-paced and hands-on course covering reporting system administration topics only. Maintaining a reasonable pace is required to ensure a complete review of all quality content and the materials presented.</p>
Skill Level recommendations	<ul style="list-style-type: none"> • Working knowledge of Microsoft Office basics (Excel/Word) • basic understanding of organization's implemented solution(s) • basic understanding of business processes • basic understanding of design and formatting (tech-savvy) • basic report development understanding and fluent in English written and oral
Format	(Virtual) Classroom Training (maximum of 8 trainees)
Duration	<p>4 days (4 Hours per day)</p> <p>Times (Time zones):</p> <ul style="list-style-type: none"> • 10:00 a.m. - 2:00 p.m. Pacific Time • 11:00 a.m. - 3:00 p.m. Mountain Time • 12:00 p.m. - 4:00 p.m. Central Time • 1:00 p.m. - 5:00 p.m. Eastern Time
Learning Objectives	<ul style="list-style-type: none"> • Security Advanced Topics • Advanced Module Forms Configuration Advanced Workflow Template • Advanced Reporting Foundations

Session Agenda

Day 1

Topic
Introductions and Agenda Review
Security Model Level Set Session
Security Advanced Topics

Security Advanced Topics Exercise

Day 2

Topic

Complete Advanced Security Topic Exercises
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Module Forms Configuration Overview

Advanced Module Forms Configuration Exercises – Part 1
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Day 3

Topic

Advanced Module Forms Configuration Exercises – Part 2
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Workflow Template – High Level Overview

Advanced Workflow Template Exercises

Day 4

Topic

Complete Advanced Workflow Template Exercises

Reporting Foundations Overview

Reporting Foundations Exercises

3.4 Reporting and Data Visualization Training

This course explains functionalities of the Compliance 360 with the companion reporting tool of the Report Layout Designer (RLD). These sessions will provide a foundation in advanced reporting allowing the student to have an excellent working understanding of the Reporting module and Report Layout Designer (RLD). Knowledge and understand received during these session includes customization features such as calculated fields and conditional formatting, sub-reports, and assessment style reporting.

Reporting and Data Visualization Training	
Target Audience	The target audience of this course are dedicated and seasoned administrators and report writers/business analysts
Prerequisites	<p>For best learning results before attending this course, students must have completed the following courses:</p> <ul style="list-style-type: none"> • Introduction to C360 • C360 Basic System Administrator Standard Reporting • six months experience (or equivalent) actively administering aspects of the Compliance 360 application powered by SAI360 • foundation level understanding of the concepts of security, workflow templates, and modules used by your company • understanding of your company's business processes and how Compliance 360 powered by SAI360 is currently leveraged • IT background or experience with enterprise applications <p>* Please note: Sessions are fast-paced and hands-on course covering reporting system administration topics only. Maintaining a reasonable pace is required to ensure a complete review of all quality content and the materials presented.</p>
Skill Level recommendations	<ul style="list-style-type: none"> • Working knowledge of Microsoft Office basics (Excel/Word) • basic understanding of organization's implemented solution(s) • basic understanding of business processes • basic understanding of design and formatting (tech-savvy) • basic report development understanding and fluent in English written and oral
Format	(Virtual) Classroom Training (maximum of 8 trainees)
Duration	<p>4 days (4 Hours per day)</p> <p>Times (Time zones):</p> <ul style="list-style-type: none"> • 10:00 a.m. - 2:00 p.m. Pacific Time • 11:00 a.m. - 3:00 p.m. Mountain Time • 12:00 p.m. - 4:00 p.m. Central Time • 1:00 p.m. - 5:00 p.m. Eastern Time
Learning Objectives	<ul style="list-style-type: none"> • Security Advanced Topics • Advanced Module Forms Configuration Advanced Workflow Template • Advanced Reporting Foundations