

University of Louisville

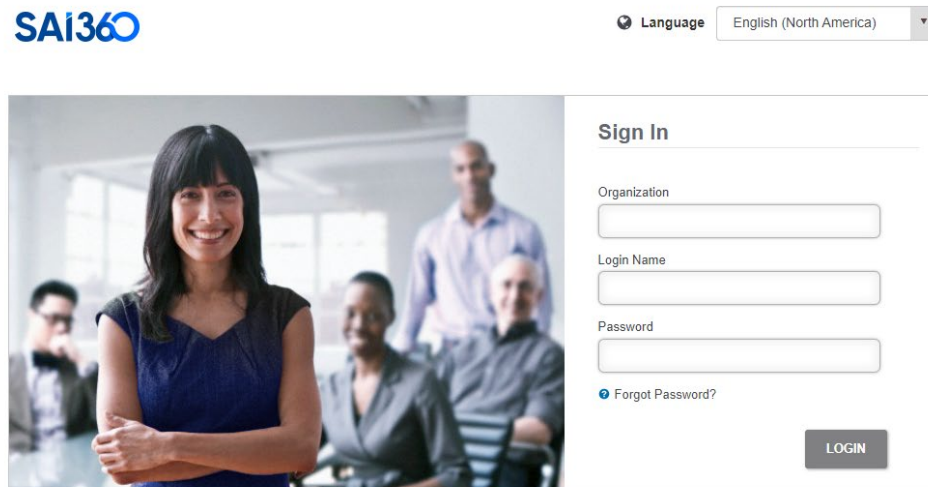
SAI360 Overview

**for School, Department and/or Division
Responsible Parties**

- **Logging into SAI360**
- **Navigating the Home Page**
- **General Information**
- **Navigating Third Party Risk Management for Contracts**
 - **Contracts Menu / Folder Structure**
- **Searching within 360**

Logging In to SAI360

In order to log SAID 360, the UofL Contract Administrator (Tina Hembree) will assign a username and temporary password for you and send it to you via e-mail. Contact your Administrator with any questions/issues regarding your login.



Web Address <https://secure.compliance360.com>
Organization uofl
Login Name (provided)
Temp Password Welcome1

➔ **NOTE: Password is case sensitive. Organization and Login Name are not.**

1. Open your web browser and type in the URL address for access to the login page (see above). Recommend saving as a favorite
2. Type in the Organization, Login Name and Password provided to you.
3. Click the **Login** button under the password field to login.

➔ **NOTE: You will be asked to change your password after your first login.**

Navigating the Home Page

It is important to remember that the Web browser toolbar should not be used in 360. For instance, you will never use the browser Back and Forward buttons. Use the buttons in 360 to navigate through the system.

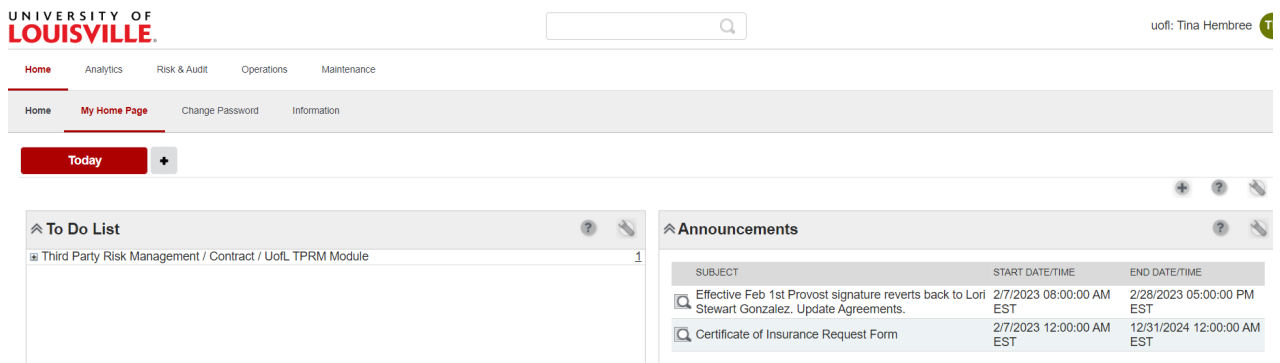
The modules and folders that a user sees are based on the user's permissions. Users will only see modules and/or folders where they have at least 'View' permission.

Home Page

To Do List and Announcements are default Plug-ins

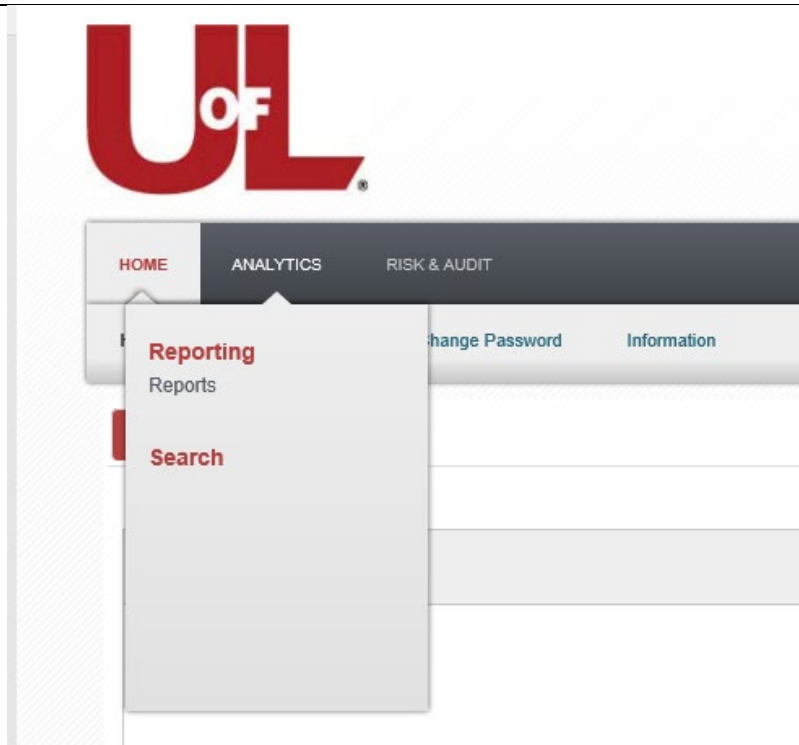
What is a To Do List: Whenever a Contract record is assigned to you to complete a task it will appear on your To Do List. Don't worry, you will also receive an email from system as well to notify you that an action is needed. Complete the action in a timely manner or there may be a delay in processing the agreement.

What is a Plug-in: A Plug-in is an added piece of information that improves the functionality of the page. For example, if you wish to see a list of Contract for which you are responsible, you can set up a plug-in on your Home Page and select specific filters to see only the data you wish. If you would like to add plug-ins contact your Contract Administrator.

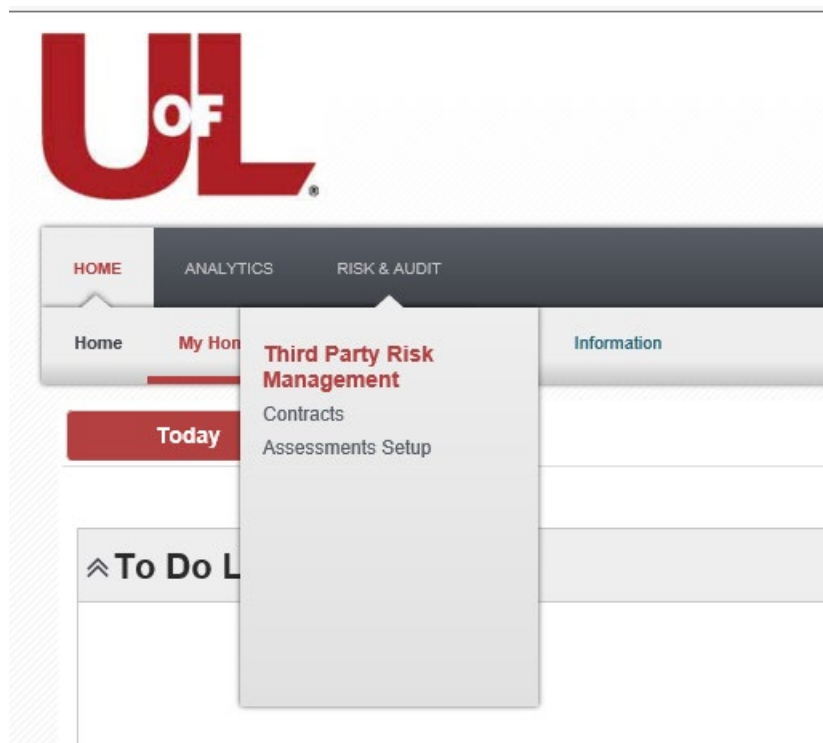


1. When you login, the system defaults you to the Home screen. If you hover over any of the top level menu items, the modules within that top level will appear. The Menus that you should see are **HOME, ANALYTICS** and **RISK & AUDIT**


2. If you hover over Analytics, you will see the Reporting and Search modules.



3. If you hover over Risk & Audit, you will see the Third Party Risk Management (Contracts) module including the various components of the module.



General Information

- Any field label with a red asterisk * is required. If you do not fill in these fields you cannot submit the contract for processing
- Any field with a down arrow  has a list of options to choose. Click on the down arrow and click on the appropriate option

* **School**

School of Medicine ▼

Centers & Institutes

EVP Health Affairs

School of Dentistry

School of Medicine


School of Nursing

School of Public Health & Informatic Sciences

- Any field with both an **Add** and **Remove** option is a multi select field, where more than one value can be selected. After choosing, the select boxes will have to be manually closed.

University of Louisville Entities

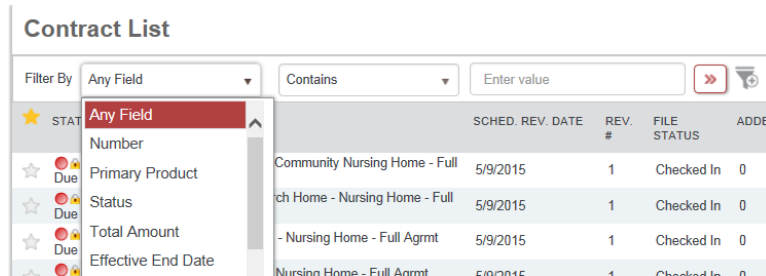
Add
Remove

- Hover over the "Info" icon  to see details on filling out the field
- Expand the Display records to see more (defaults to 10)

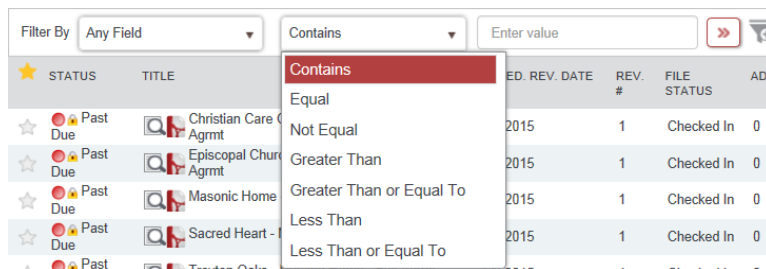
Contract List									
Filter By		Any Field	Contains	Enter value					
★	STATUS	TITLE	SCHED. REV. DATE	REV. #	FILE STATUS	ADDENDA			ACTIONS
	Past Due	Christian Care Community Nursing Home - Full Agrmt	5/9/2015	1	Checked In	0			Actions
	Past Due	Episcopal Church Home - Nursing Home - Full Agrmt	5/9/2015	1	Checked In	0			Actions
	Past Due	Masonic Home - Nursing Home - Full Agrmt	5/9/2015	1	Checked In	0			Actions
	Past Due	Sacred Heart - Nursing Home - Full Agrmt	5/9/2015	1	Checked In	0			Actions
	Past Due	Treyton Oaks - Nursing Home - Full Agrmt	5/9/2015	1	Checked In	0			Actions
	Past Due	Aetna - Full Agrmt	5/9/2015	1	Checked In	0			Actions
	Past Due	Aetna Amendment - add MA	5/9/2015	1	Checked In	0			Actions
	Past Due	Anthem - Full Agrmt	5/9/2015	1	Checked In	0			Actions
	Past Due	Anthem - Amendment - IN Medicaid	5/9/2015	1	Checked In	0			Actions
	Past Due	Anthem - Amendment - KY Medicaid	5/9/2015	1	Checked In	0			Actions

Items per page: 10 Showing 1-10 of 155 Page 1 of 16

- Filters can be applied to a list of more than 10 Contracts, so you can locate specific records
 - Select a field to filter from the dropdown list



- Select how you want to filter



- Enter the criteria and click the **Add Filter** button



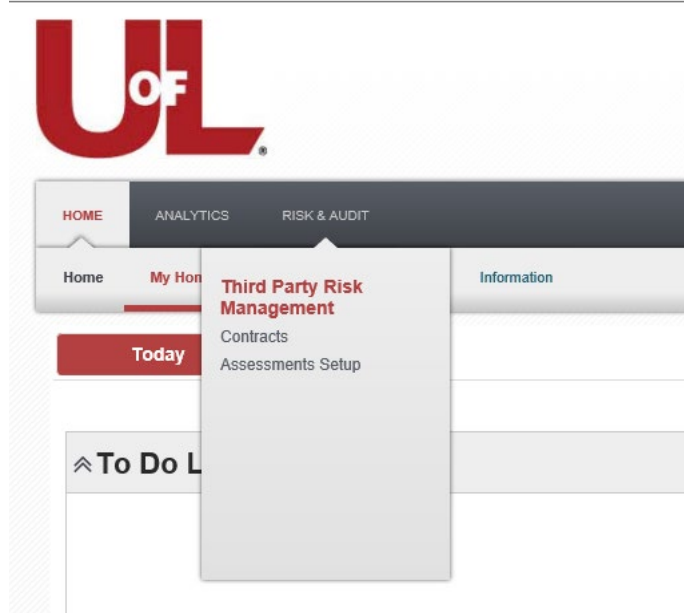
- **360 has "sticky" filters. The next time you return to the list, the filter will still be applied. You must click **Cancel** to remove the filter.**



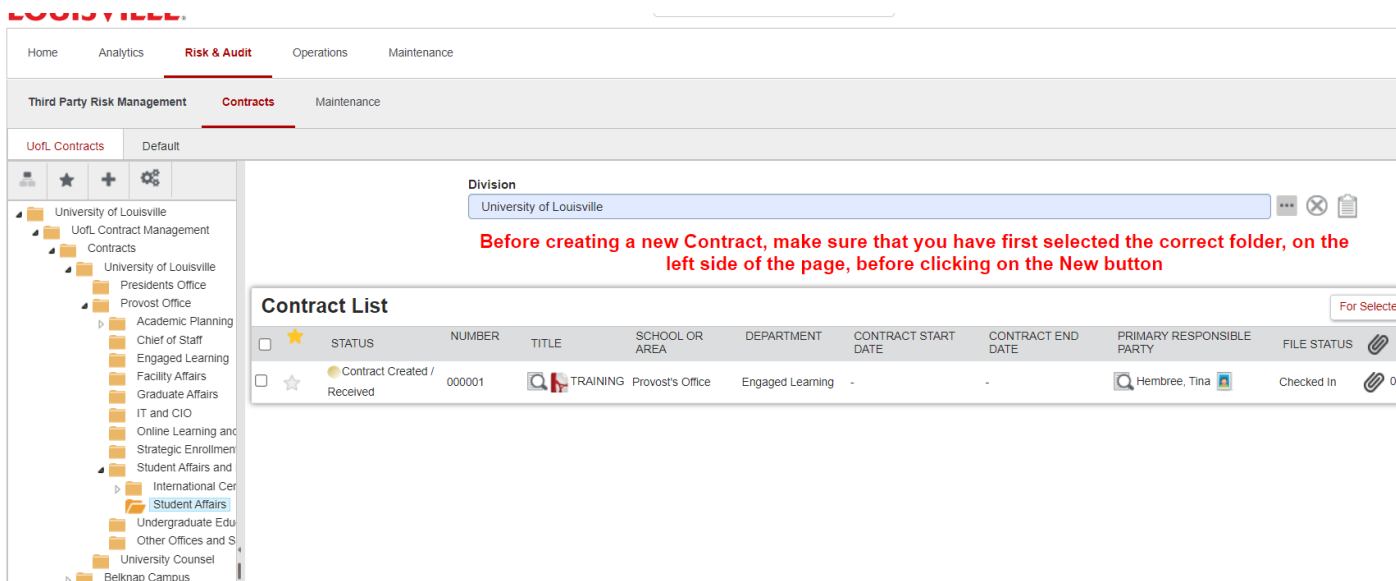
- Contract records can be marked as favorites by clicking on the Star icon at the front of the record. Once marked, the user would go directly to the "Favorites" folder to see only those Contracts that have been isolated as favorites.

Navigating Third Party Risk Management Module for Contracts

1. In the example below, if you hover over Risk & Audit, you will see the Third Party Risk Management module



2. If you click on Contracts, your screen will refresh and your page will now show that module. In the example below, the Third Party Risk Management module has been selected from the Risk & Audit Top Menu and the Contract menu item.



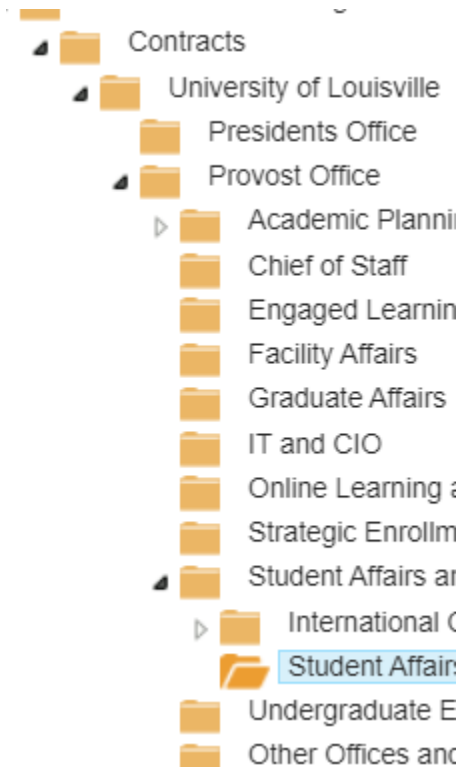
Division field

Once you have selected the Third Party Management module and the Contract menu item, you will see the Division field. The Division field indicates the area of Compliance 360 that you are working from. **You will have access to – University of Louisville. It should default to UofL. If not, contact the Contracts Administrator.**

Within Compliance 360, the term “Division” refers to the organization of data in the database **NOT THE DIVISION WITHIN A DEPARTMENT.**

Contract Menu / Folder Structure

1. The Contract menu item is the area defaulted when you navigate to the Third Party Risk Management module
2. The Third Party Risk Management module/Contract menu has a folder structure (shown in the left-hand side). There will be a main folder for the Contract Management, under which there will be a folder for each “School”. Under each “School” folder, there may be folders representing the “Departments”. Under some of the “Department” folders there may be “Division” folders. The Contract records will be located in “Division” folders or “Department” folders.
3. To view the subfolders you must click on the **white** triangle next to the folder to expand.



4. The list of Contract records that can be found in a folder are in the Contract List on the right-hand side.

5. There is an Actions button for each Contract record. Clicking on the Actions button gives you options to select. The actions available depend on which step in the workflow the Contract is currently in, and your permission level.

Home Analytics **Risk & Audit** Operations Maintenance

Third Party Risk Management **Contracts** Maintenance

UofL Contracts Default

Division
University of Louisville

Before creating a new Contract, make sure that you have first selected the correct folder, on the left side of the page, before clicking on the New button

Contract List For Selected New

	STATUS	NUMBER	TITLE	SCHOOL OR AREA	DEPARTMENT	CONTRACT START DATE	CONTRACT END DATE	PRIMARY RESPONSIBLE PARTY	FILE STATUS	ACTIONS
<input type="checkbox"/>	Contract Created / Received	000001	TRAINING	Provost's Office	Engaged Learning	-	-	Hembree, Tina	Checked In	Actions

Edit
Submit for Contract Admin Review
Go to:

Searching within Compliance 360

You can use the search feature to easily locate specific contracts that you are looking for within the system.

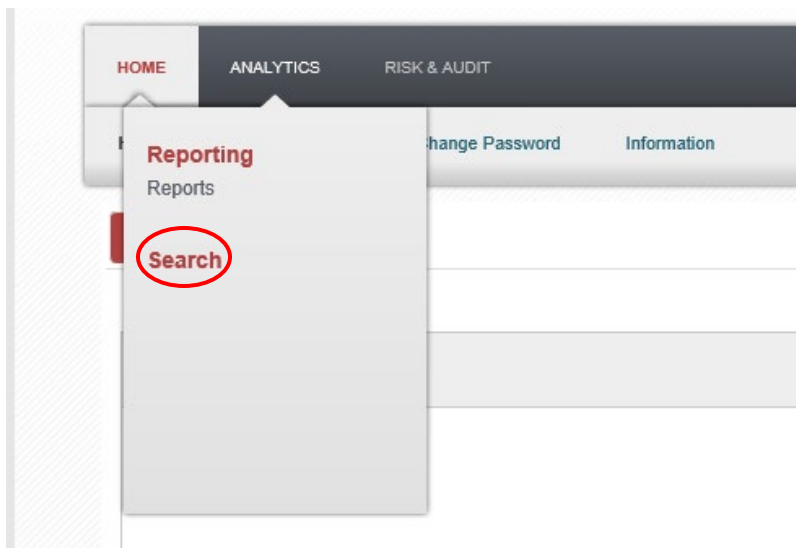
The search is based on any data fields that have been entered on the Contract.

The search results will only display contracts that you have view permissions to.

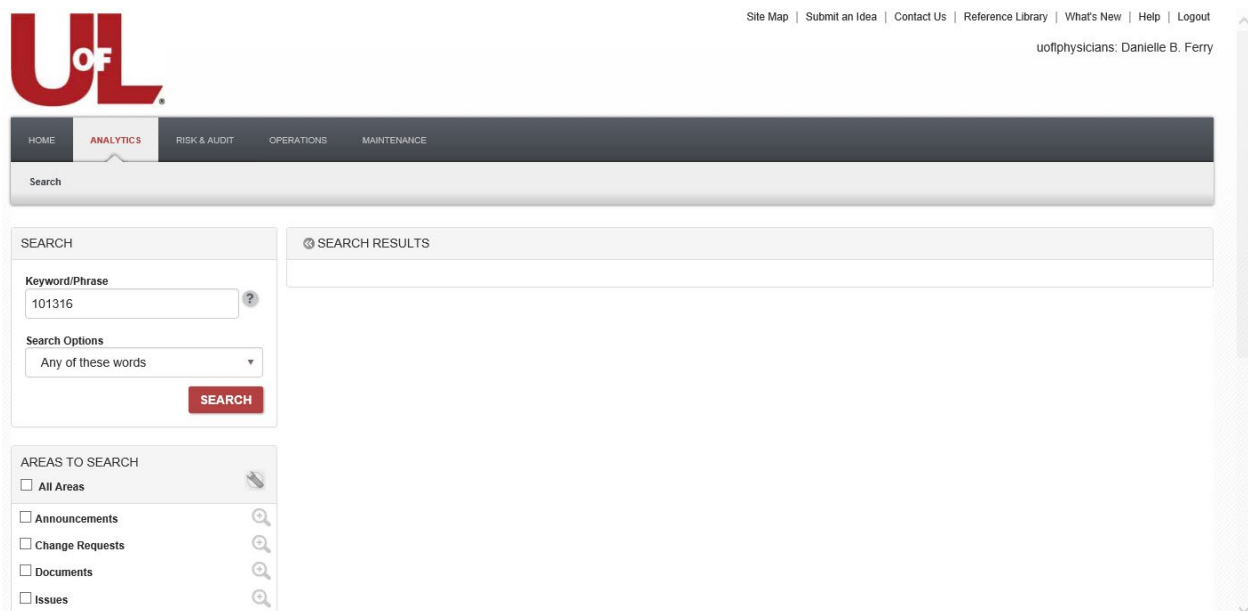
*****NOTE: Using the Naming Convention and Description fields properly help when trying to search*****

To Search:

1. Hover over Analytics on the top menu level and click on the **Search**

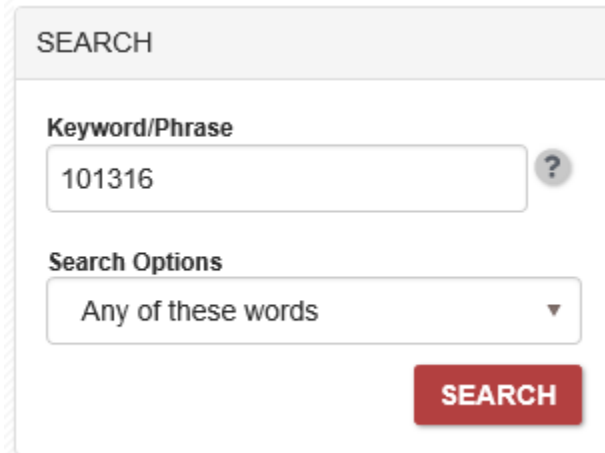


2. The Search page will open.



3. Enter the keyword/phrase
4. Select the appropriate Search Options from the dropdown menu

Note: The default is "Any of these words"



SEARCH

Keyword/Phrase

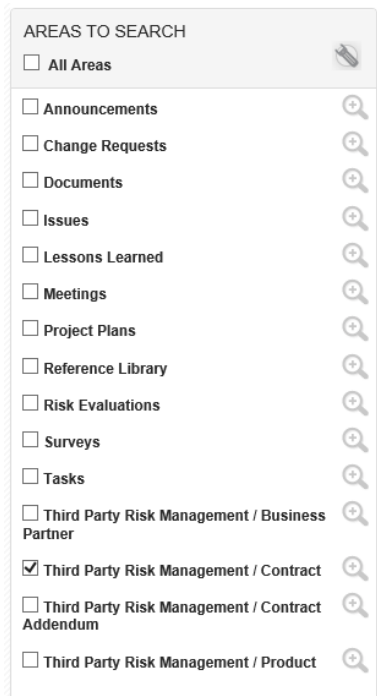
101316

Search Options

Any of these words

SEARCH

5. Scroll down the page to the **Areas to Search** section
6. Click the **Checkbox** for Third Party Risk Management/Contract in the Areas to Search section
7. *****NOTE: After you have made these selections they will remain selected everytime you search*****



AREAS TO SEARCH

All Areas

Announcements

Change Requests

Documents

Issues

Lessons Learned

Meetings

Project Plans

Reference Library

Risk Evaluations

Surveys

Tasks

Third Party Risk Management / Business Partner

Third Party Risk Management / Contract

Third Party Risk Management / Contract Addendum

Third Party Risk Management / Product

8. Click the **Search** button next to your **Keyword/Phrase** entry
9. Your results will show in the right pane
10. *****NOTE: You can take action on the Contract from this page.*****