Certification Assistant Partner

Contents

Certification Assistant Partner 1
- Certification Assistant Partner Process 2
- CAP User Levels 3
- CAP Dashboard 3
  - Clients Panel 4
  - Projects Panel 4
  - Consultants & Message Inbox Panel 5
  - My Active Projects 5
  - Navigation 6
- Client Management 7
- Project Management 8
  - Request CA Access 9
  - Access Client 9
  - Update Documentation 10
  - Disconnect Access 10
- Consultant Management 11
- Documents 12
- Settings 14
- Messaging 15

Certification Assistant Partner Process

The process between Certification Assistant (CA) and Certification Assistant Partner (CAP) contains many steps designed to walk users and consultants through the process efficiently.

1. CA users will request an engagement using the Partner Engagement feature.
2. CA organization and the CAP organization will discuss and agree to terms offline.
3. CAP administration will Accept or Decline the engagement.
    a. If Declined, the engagement process is terminated.
4. When Accepted, CAP administration will assign a lead consultant and, if needed, additional consultants to the project.
5. CAP consultants will request access to the CA organization's account to review content, assign actions, and/or upload documentation.
6. CA organization will Accept or Decline access.
    a. If Declined, the CA and CAP users will work on assessment/review activities through other means.
7. CAP consultants will perform the assessment and complete agreed upon activities.
8. The access to the CA organization will be disconnected. Note – if needed, the consultant may request access again. At this stage, the consultant will produce a report (reviewed by CAP management).
9. CAP consultant will deliver the final report to the CA organization electronically through the Partner Engagement feature.
10. If both parties agree, then the engagement can be terminated, and the project will be marked complete.

Project status is available in CA under Partner Engagement and in CAP on all the management screens.

This document will only cover CAP functions, see Certification Assistant Lite or Certification Assistant Stand/Premium for details on the CA functions for Partner Engagement.

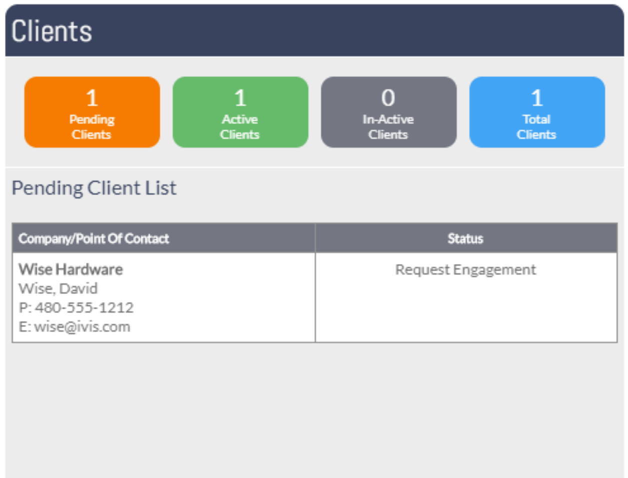
CAP User Levels

There are three user levels within CAP: CAP Admin, CAP Manager, and CAP Consultant. The CAP Admin user is responsible for Accepting or Declining engagements, assigned consultants and overall access to the CAP system. The CAP Manager role is responsible for engagement and project oversight and documentation review. The CAP Consultant role is responsible for executing the project, interacting with the client organization, and producing the final report.

CAP Dashboard

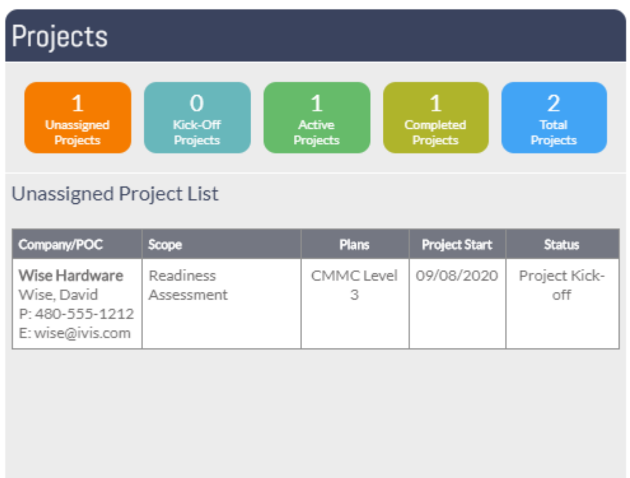
All users have access to the same dashboard, although the information on the dashboard is filtered based on their role. The view above is for a CAP Admin user.

Clients Panel



This panel displays the active counts for Pending, Active, In-Active and Total Clients. The list below is for Pending Clients, or clients that have requested an engagement, and that engagement has not been accepted or declined.

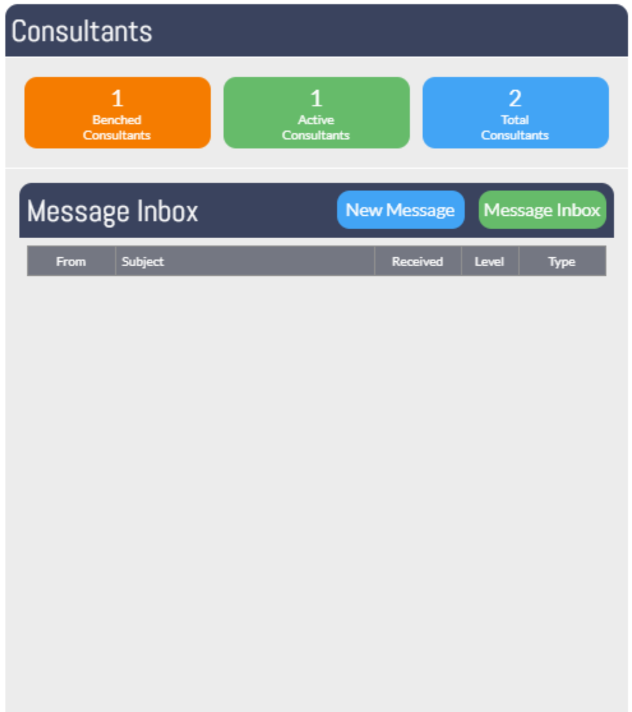
Projects Panel



Like the Clients panel, the Projects panel displays counters for Unassigned, Kick-off, Active, Completed and Total Projects. An Unassigned project currently has no consultants assigned. A Kick-Off project has been assigned, but the consultant has not requested access to the CA organization's account.

The list below the counters, displays the projects that are currently not assigned.

Consultants & Message Inbox Panel



Counters for Benched, or currently unassigned consultants, Active, and Total Consultants are found in this panel. Below the counters is the Message Inbox. See the Messaging section later in this document for details.

My Active Projects

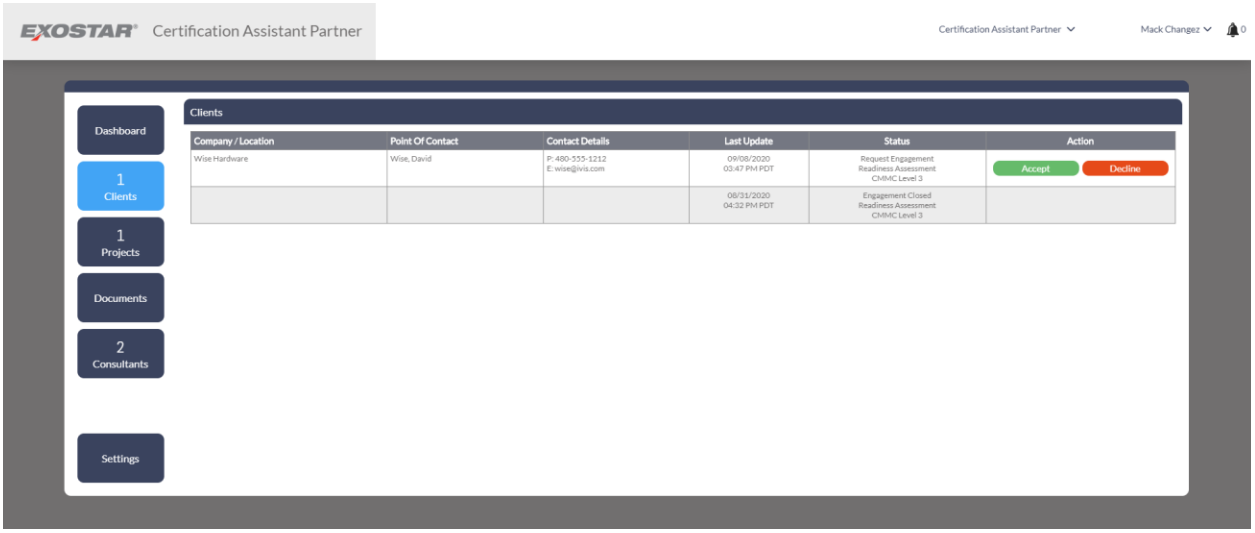
If the current user is a CAP Consultant, this panel will show all active projects the consultant is assigned to.

Navigation

The left side navigation buttons are used to move around in the system.

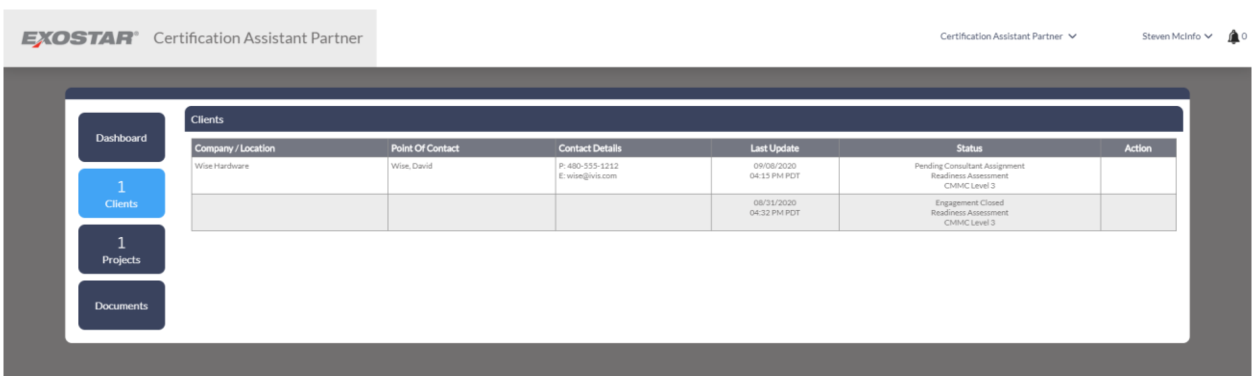
- Dashboard – return to the 'home page'
- Clients – access the Client Management screen, the number reflects the number of active clients.
- Projects – access the Project Management screen, the number reflects active projects.
- Documents – access to the repository of active and completed documentation/reports from engagement projects.
- Consultants – access to the Consultant assignment utility and the number reflects total consultants.
- Settings – CAP Admin only access to the role management features to adjust CAP user roles.

Client Management



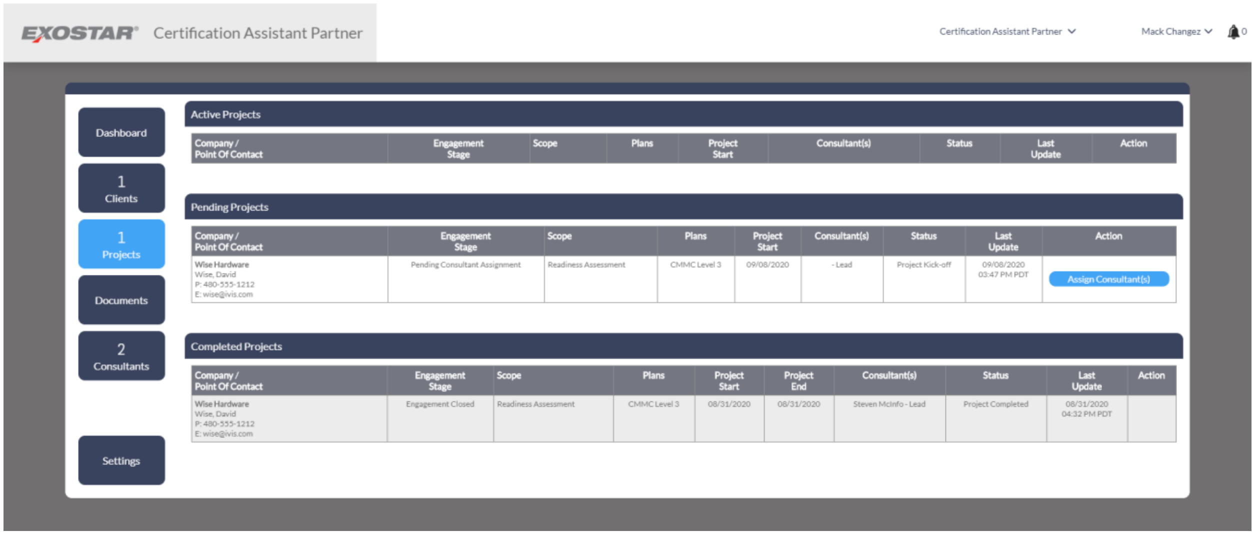
CAP Admin – Accept or Decline engagement requests and when accepted, Terminate active engagements.

CAP Manager & CAP Consultant – Read-only access.

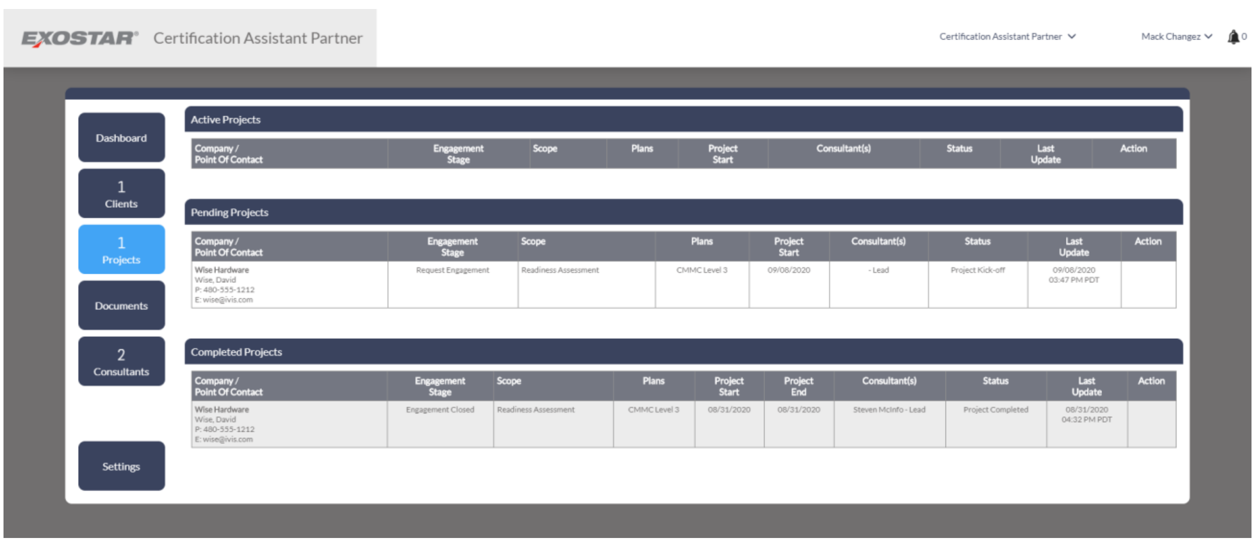


Project Management

CAP Admin – Assign Consultant(s) to accepted project engagements.

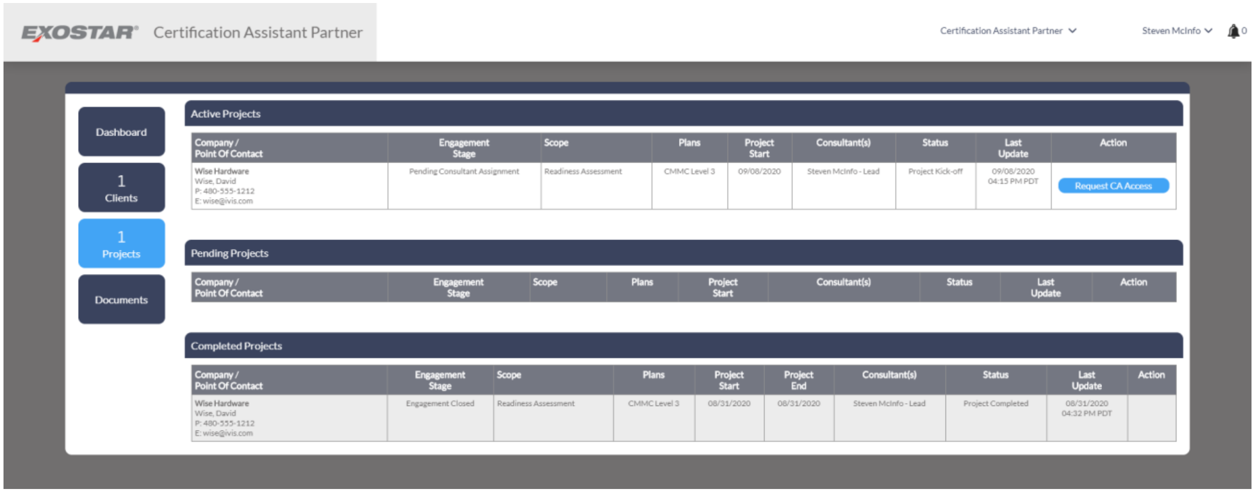


CAP Manager – Read-only access to view status.



CAP Consultant – Manage interactions with the CA organization, access project documentation, access the client account data.

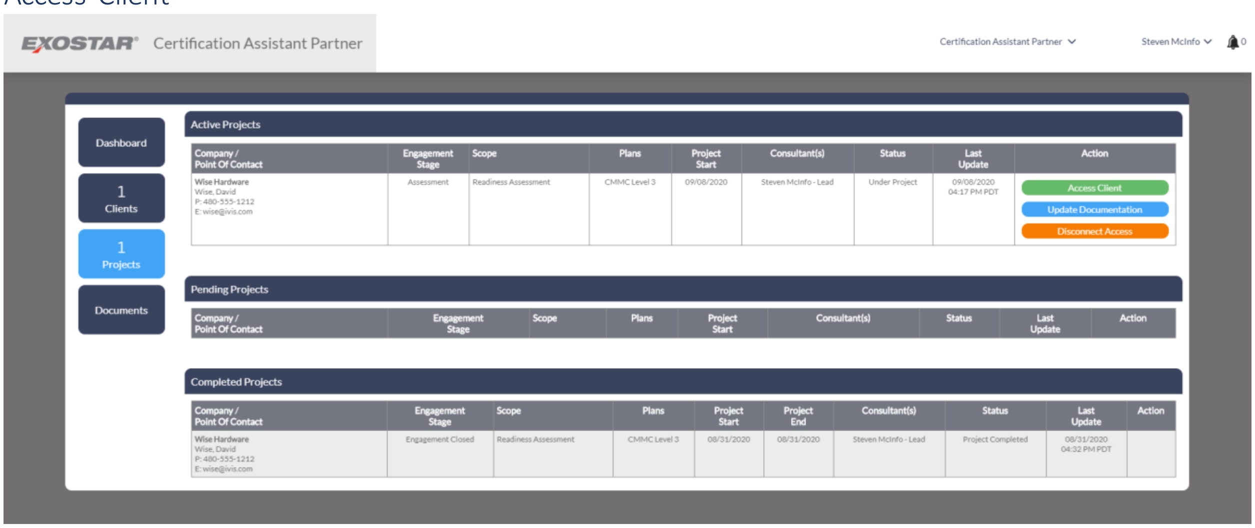
Request CA Access



The consultant will click on the Request CA Access button to send a notification to the CA user requesting access to their account data. The CA user can then Accept or Decline the request. If the request is declined, the CA user and CAP consultant will be responsible to sharing information via other methods.

After the CA Access Request is accepted by the CA organization:

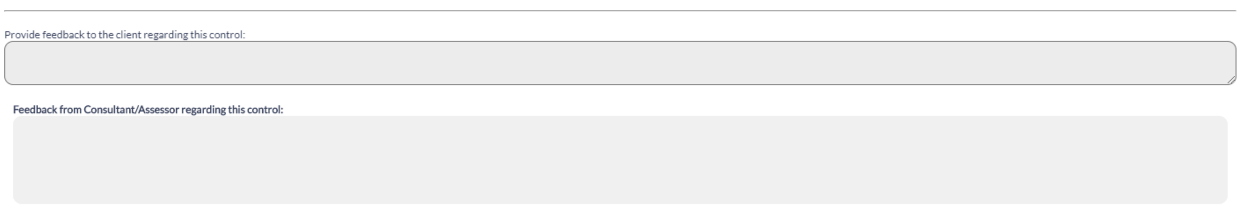
Access Client



To enter the CA organization's account, the consultant will click on Access Client.

Clicking on the Access Client button will redirect the consultant to the client's account in CA.

All functions of CA are now available to the consultant as if they were a user in the client's account. The consultant can review the information entered by the client, you can assign action items to users in the client organization, and you can leave comments on Self Assessment practices and processes for the client to review.



The last comment entered by the consultant will be included in the report delivered at the end of the project. Use the Exit Client button in the header green box to return to CAP.

Update Documentation

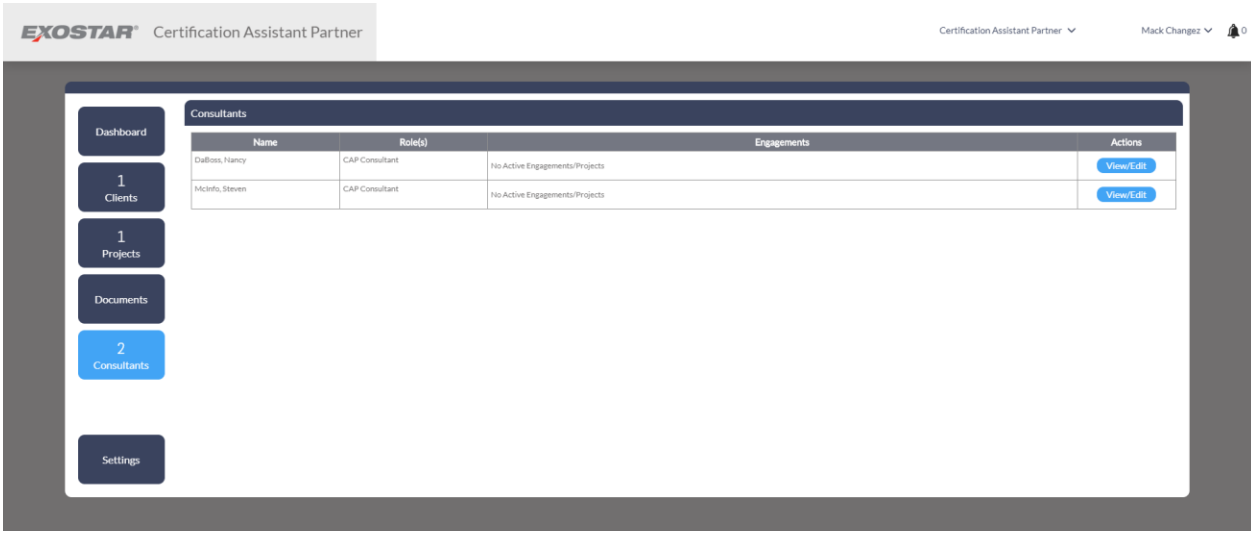
Click the Update Documentation button to switch over to the Documents section for access to the report for this client. Details on the Document section are provided below.

Disconnect Access

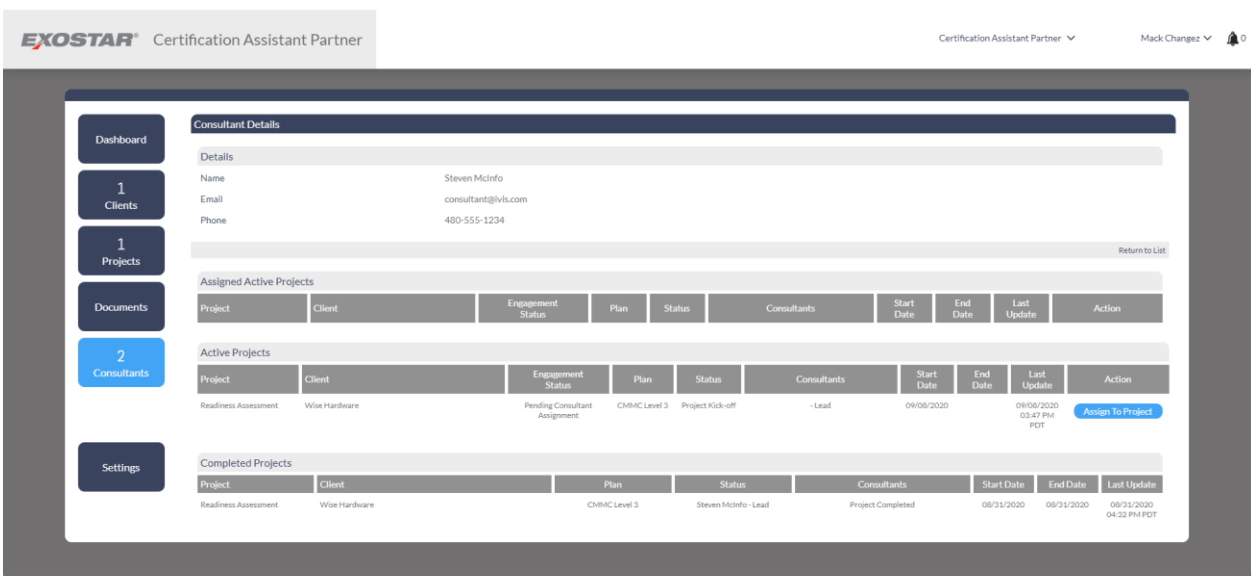
When the consultant has completed work needed in the CA organization's account, click the Disconnect Access button to remove the ability to enter their account. If needed, access can be requested again.

Consultant Management

CAP Admin users will use the Consultant Management to assign consultants to projects. Click on the View/Edit button to access the details page.



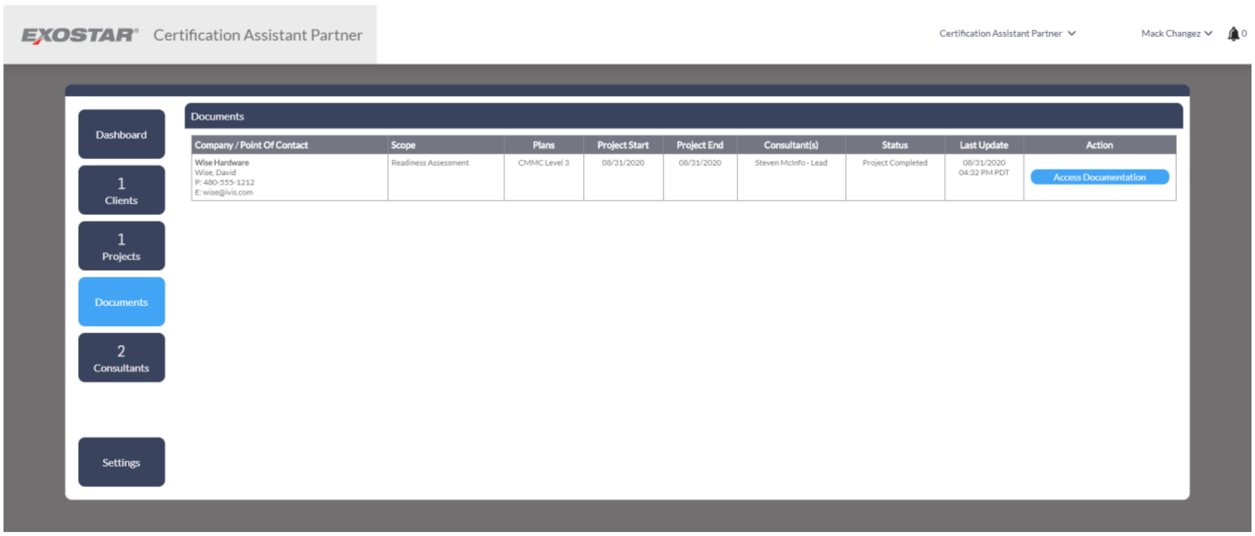
On the Consultant Details page, there are lists for this consultant's Assigned Active Projects, Active Project – which are projects that are available to be assigned to and Completed Projects. To assign the consultant to the project, click on the Assign To Project button. If there are no currently assigned consultants, the selected consultant will be assigned as the Lead. Otherwise, they will be added to the list of available consultants on the project.



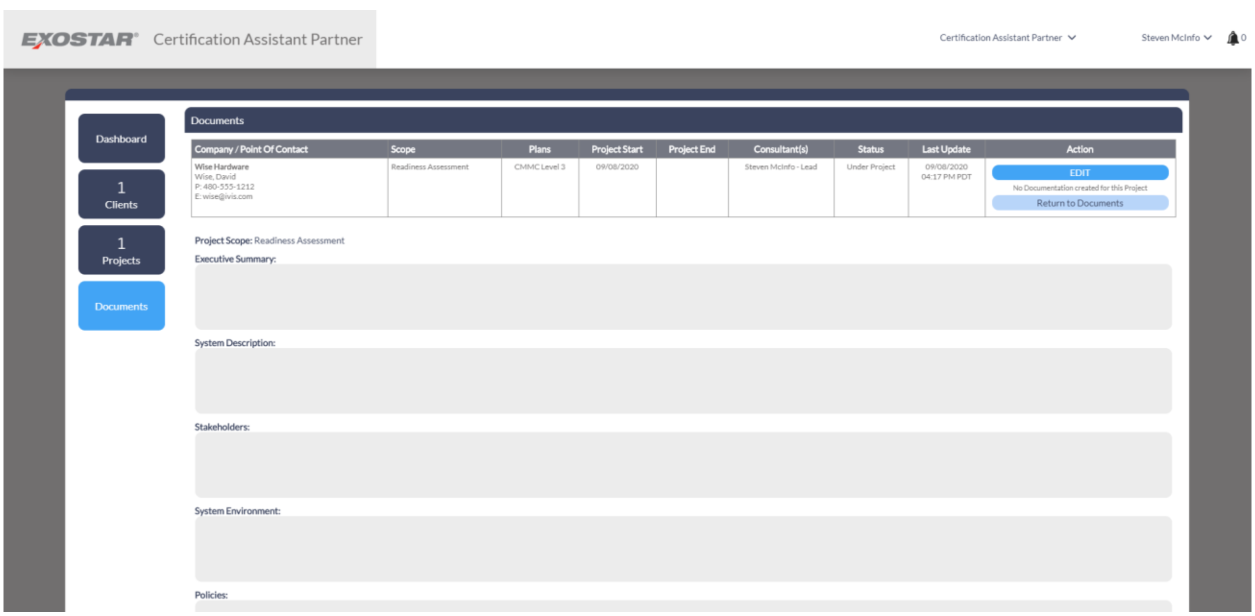
Consultants can also be removed from projects on this page, click on the Remove From Project and their name will be removed.

Documents

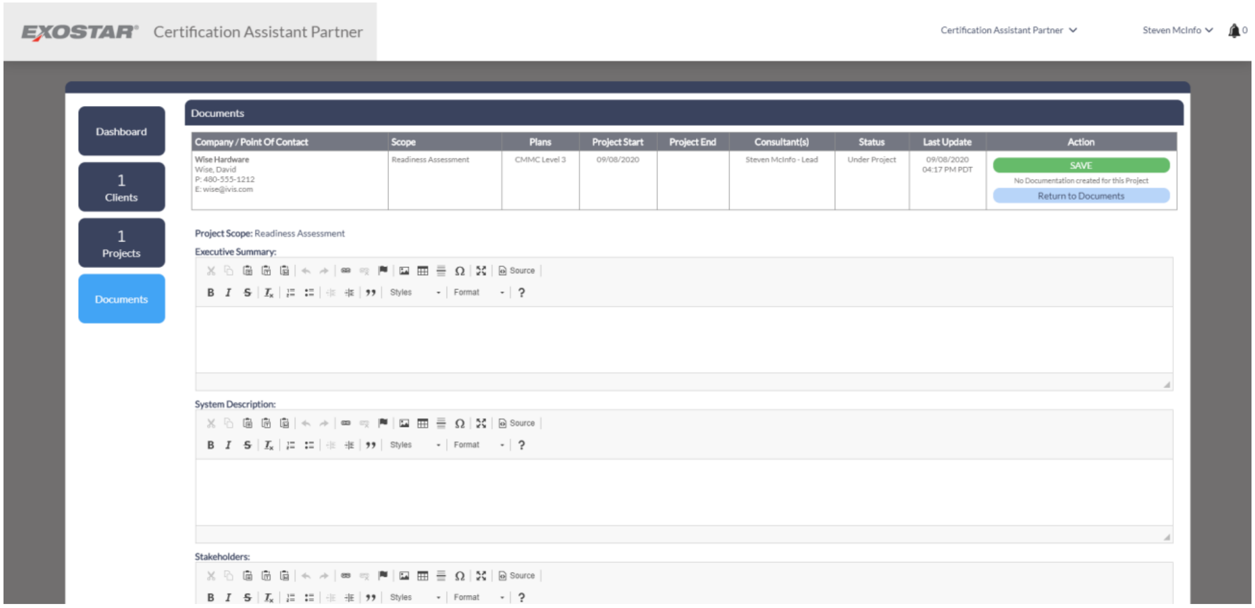
The Documents section is used to create the final reports for consultants to send to their clients. From the Project section, click on Update Documentation to access Documents. Also, clicking on the Documents left navigation button will open the Documents section. To work on the documentation for a project, click on the Access Documentation button.



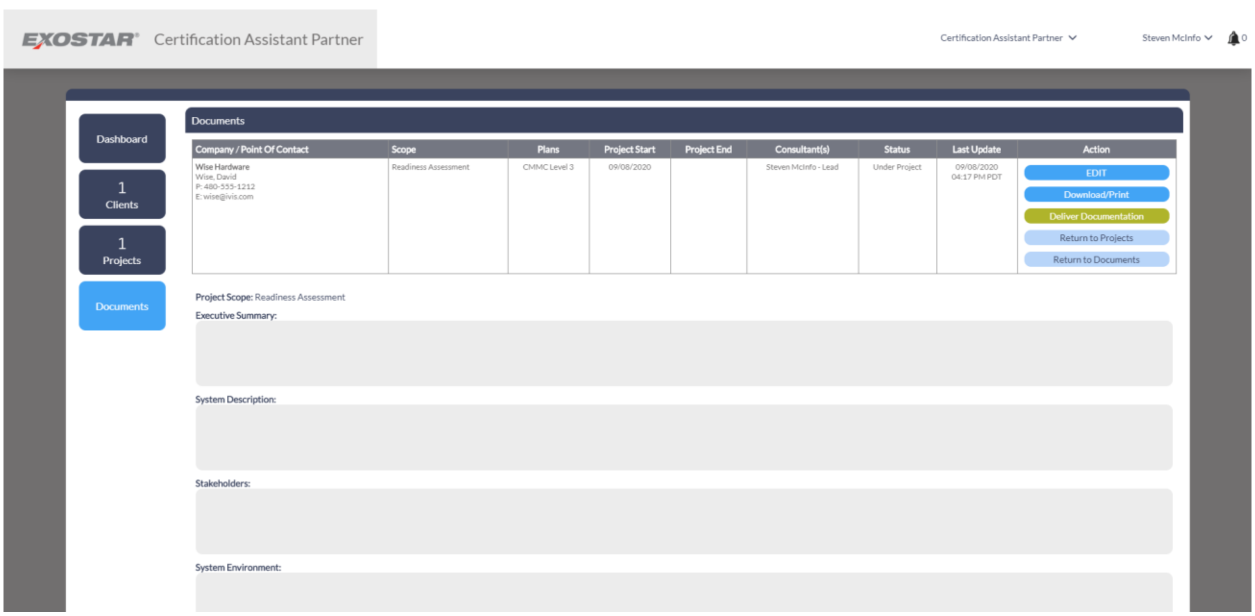
Until there has been a document created, the message No Documentation created for this Project. To start, click on the Edit button.



The consultant will enter their assessment into each of the text areas and click on Save. This will create a new documentation record or update the existing record.



Once the documentation is created, options for Download/Print and deliver Documentation are enabled. Download/Print will make a PDF version of the documentation available for print or saving to your local system. Deliver Documentation will send a PDF of the document to the CA organization and send a notification via the messaging system. Use the Return to Projects or Return to Documents buttons to navigate back to those sections.

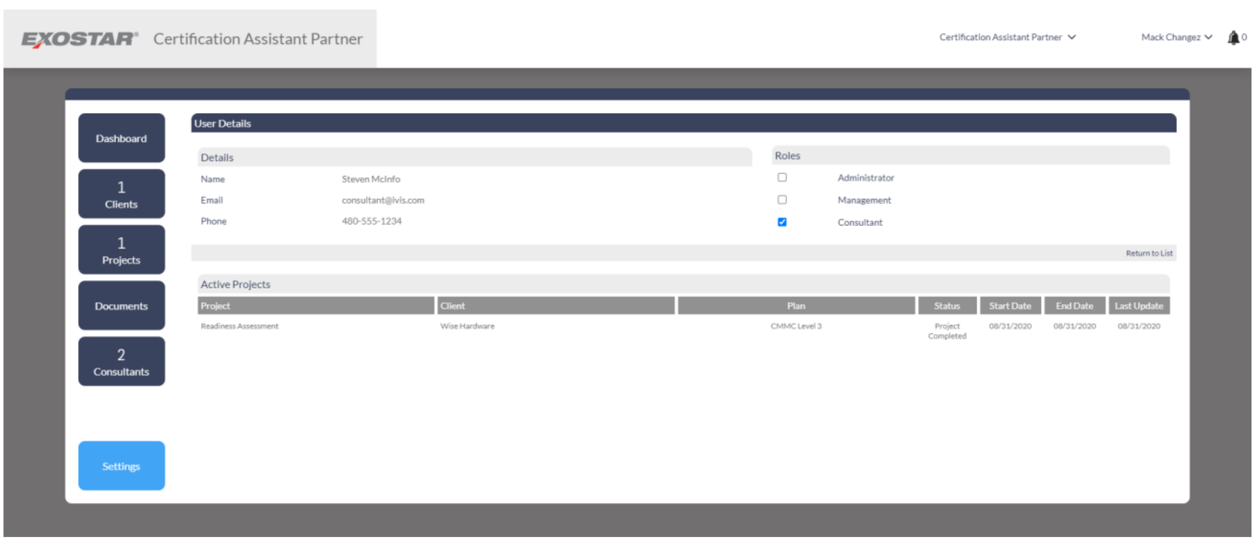


If needed, the document can be edited after being sent to the CA organization by clicking on the Update Documentation button. Resending the document after edits will replace the original sent to the CA organization.

Settings

Manage CAP users via the Settings section. Only CAP Admin users will have access to this section.

Click on the View/Edit button to access the User Details page.



Select the user's role(s) and the selection will autosave. If you are viewing the only remaining CAP Admin user in the system, you will be prevented from removing that role as there must always be at least one admin user.

If Consultant is selected, the Active Projects list will be shown below. Use the Return to List link to return to the home page for Settings.

Messaging

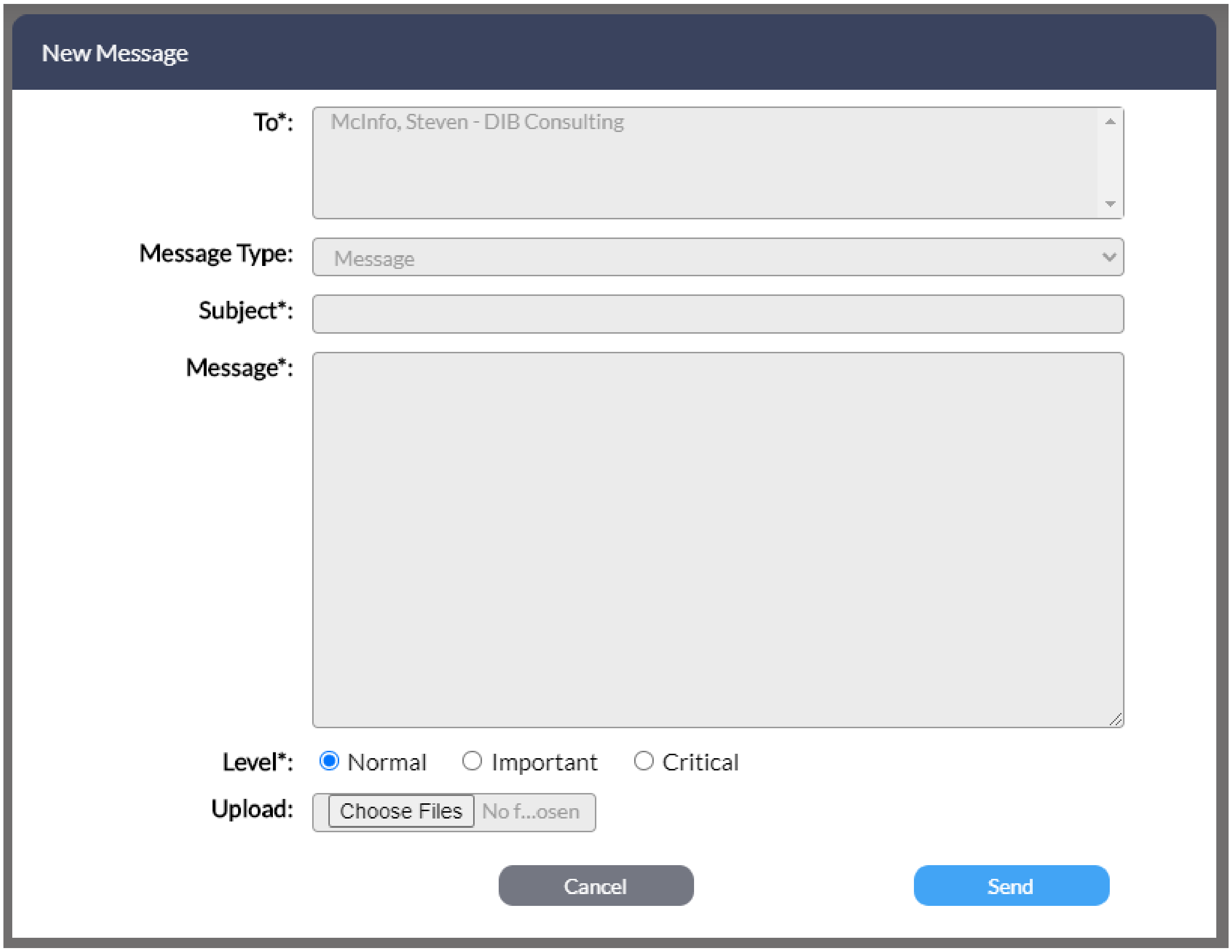
Message notifications are found in the upper right next to your username.

If the number next to the bell is higher than 0, then you have new messages waiting.

Your messages will appear in the Message Inbox on the homepage.

To increase the size of the window, click on the Message Inbox button and the messages feature will go to full screen.

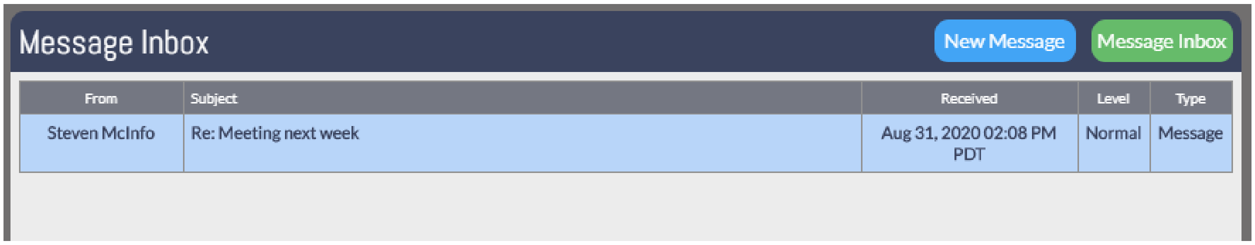
To send a message, click on the New Message button.



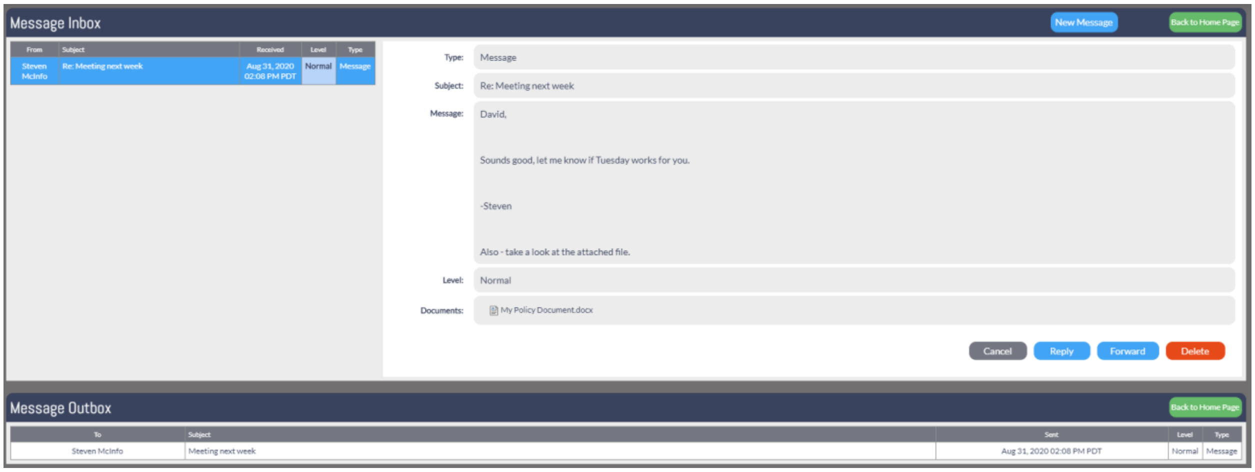
The required fields are flagged with an asterisk (*). Select one or multiple users from the To box. Use the CTRL or Apple key to select multiple. All users within your account and any consultants you are currently engaged with will be available on the list. To see more about consultants, see the Partner Engagement section.

Select your Message Type, enter a subject and enter your message. Select the Level for the message and attach files if needed. Any files attached will be uploaded and encrypted. Click the Send button and the message will show up in your sent list.

New messages will be highlighted blue and always at the top of the list.



Click on the message to view.



To reply to this message, click on the Reply button and Send when your message is complete. Similarly, to Forward to another user, click on Forward and Send when your message is complete.