

# Arena Administrator User Planning & Configuration Course Agenda

## DAY ONE

### **Lesson 1: Setting Up Account and Workspaces**

- » *Customer account and profile*
- » *Account Administrators*
- » *Workspace settings*
- » *Creating new Workspaces*
- » *Workspace features*
- » *Critical Workspace settings*
- » *Arena technical support*

### **Lesson 2: Access Roles**

- » *Access Roles Subview*
- » *Employee roles*
- » *Partner roles*
- » *Supplier roles*

### **Lesson 3: Setting Up Users**

- » *Viewing Employee user profiles*
- » *Adding Employees*
- » *Editing and disabling Employee user profiles*
- » *Viewing and assigning access*
- » *Adding Partners and Suppliers*
- » *Partner and Supplier setup issues*

### **Lesson 4: Custom Attributes and Lists**

- » *Custom attributes overview*
- » *Custom attribute locations*
- » *Creating custom attributes*
- » *Custom attribute behavior*
- » *List management*

### **Lesson 5: Item Numbering and Custom BOMs**

- » *Automated Item numbering*
- » *Configuring Item numbering*
- » *Custom bill of materials Subview*
- » *Defining custom BOMs*
- » *Custom BOM behavior*

## **Lesson 6: Basic Categorization**

- » *Categorization overview*
- » *Category example*
- » *Viewing Category details*
- » *Defining Categories*
- » *Editing Categories*
- » *Configuring Category attributes*

## **Lesson 7: Advanced Categorization Administration**

- » *Advanced Categorization overview*
- » *Category tree*
- » *Category types and inheritance*
- » *Setting up Categories*
- » *Category maintenance*
- » *Custom form layouts*

## **DAY TWO**

## **Lesson 8: Configuring Requests**

- » *Request process overview*
- » *Access requirements*
- » *Requests configuration view*
- » *Request Administrators*
- » *Evaluator groups*
- » *Notification events*
- » *Supplier access to Requests*
- » *Numbering sequences*
- » *Request code setup*

## **Lesson 9: Administering the Request Process**

- » *Uses of Requests*
- » *Request Administrator capabilities*
- » *Roles in the Request process*
- » *Dispositioning Requests*

## **Lesson 10: Change Management Configuration I**

- » *Change management overview*
- » *Change process*
- » *Change management setup*
- » *Approval Roles*
- » *Routings*

## **Lesson 11: Change Management Configuration II**

- » *Change Administrators*
- » *Change management configuration options*
- » *Numbering sequences*
- » *Custom inventory dispositions*
- » *Decision notifications*
- » *Access requirements*

## **Lesson 12: Administering the Change Approval Process**

- » *Change objects*
- » *Change Administrators*
- » *Capabilities*
- » *Roles in the Change process*
- » *Roles in implementation and cleanup*
- » *Supplier participation in Changes*

## **Lesson 13: Integrations**

- » *Outbound integration overview*
- » *Monitoring integration status*
- » *Maintaining integrations*
- » *Viewing and restoring updates*
- » *Integration setup*
- » *Integration information*
- » *Filtering information*
- » *Integration Administrators*
- » *Monitoring settings*

## **APPENDICES**

### **Appendix A: Compliance Administration**

- » *Compliance policy & strategy*
- » *Compliance Requirements overview*
- » *Adding Item Requirements*
- » *Adding Supplier Item Requirements*

### **Appendix B: Miscellaneous Administrative Responsibilities**

- » *File corrections*
- » *Arena configuration overview*
- » *Arena administrator responsibilities*
- » *Access control factors*
- » *Optional software features*
- » *Recent activity logs*