

# Create Vendor Engagements

When users create a new vendor within Vendor Risk Manager, a default engagement will be automatically created and associated with that vendor. You can think of an engagement as a service.

In addition to the default engagement, you can add additional engagements to a vendor. For example, a public accounting firm that provides audit, tax, and consulting services to your company could be a vendor, and the audit, tax, and consulting services could each be represented by engagements.

Creating new engagements requires Vendor Service View and Vendor Service Manage permissions.

## To create a new vendor engagement:

1. Open Vendor Risk Manager.
2. Go to **Vendors > Vendors**, and select a vendor to open.
3. Click the **Engagements** tab, then click **New**.

The screenshot shows a web-based wizard titled "Create an Engagement" with a close button (X) in the top right corner. The wizard is divided into three steps: "1. Basic Details", "2. Assessments", and "3. Review". The "Basic Details" step is active and contains the following fields and options:

- Engagement Information:**
  - Name\***: Text input field containing "Office Infrastructure".
  - Description**: Text area for describing the engagement.
  - Engagement Level**: Dropdown menu set to "Level 1".
  - Engagement Type**: Dropdown menu set to "Create New".
  - Stationery**: Text input field containing "Stationery".
- Business Criticality**: Radio buttons for "Unknown" (selected), "Low", "Medium", and "High".
- Tags**: A section with "New" and "Delete" buttons, a "Filter by" dropdown set to "Show all", and a "Refresh" button. Below is a table with columns "Tag Category", "Tag Name", and "Description". The table is currently empty, displaying "No tags found."

At the bottom of the wizard, there are three buttons: "Cancel", "< Back", and "Next >".

*The Create an Engagement wizard.*

4. Enter the engagement name in the **Name** field.
5. **Optional:** Enter the following fields, as desired:
  - **Description:** Enter information about the engagement.
  - **Engagement Level:** Select the engagement level.
  - **Engagement Type:** Select the engagement type of the vendor's services. To create a new engagement type, click **Engagement Type > Create New**, then enter a type.
  - **Business Criticality:** Set the criticality.
  - **Tags:** Tag an engagement to one or more categories.
    - Click **New**, then select a category, or click **Tag Category > Create a Category**.
    - Select a tag or click **Tag > Create a tag**. If you select **Create a Category** or **Create a Tag**, you

will also need to enter their names.

- Click **OK**.

6. Click **Next**.

7. **Optional:** Assess the new engagement using existing programs or by creating of new program. The system selects **Add to ongoing programs** by default.

The screenshot shows a software window titled "Create an Engagement" with a red close button in the top right corner. On the left is a vertical navigation pane with three items: "1. Basic Details", "2. Assessments" (which is highlighted in blue), and "3. Review". The main content area is titled "Step 2: Launch Assessments for the Vendor" with a red asterisk and "= required" to its right. Below the title is a yellow instruction bar: "Add the new Engagement to ongoing Assessments." There are three radio button options: "Add to ongoing programs.", "Create a new program to assess with." (which is selected), and "Do not assess at this time." A yellow warning box with a triangle icon is positioned below the second option, containing the text: "You will be guided through the steps to create a new Program after you click on the finish button." At the bottom of the window, there are three buttons: "Cancel" on the left, "< Back" in the middle, and "Next >" on the right.

*The Assessments wizard page.*

8. **Optional:** To assess the new engagement by means of adding to ongoing programs, select a program in the grid. Click **Due Date** to change the due date for the assessment. When you click **Create a new program to assess with**, the **New Program** wizard will open after you finish creating the engagement. Click **Next**.

9. Review the vendor details to ensure they're correct, then click **Finish** to add the new vendor engagement.