

# How to Add/Update OneTrust Records or Request a New External Partner Security or Agreement Review

The WSI [External Partner Engagement Policy](#) requires Business Owners to ensure that their External Partner, vendor, or manufacturer (“vendor”) information is current in the Third-Party Risk Management tool, OneTrust.

## Launching OneTrust

Navigate to the OneTrust Self-Service Portal at <https://app.onetrust.com/app/#/pia/ssp> or select OneTrust from the [SSO Access Portal \(Ping\)](#) menu. **(Note: OneTrust performs best in browsers such as Chrome or Firefox. If your default browser is Internet Explorer, rather than selecting OneTrust from the SSO Access Portal, copy and paste the [OneTrust URL](#) listed above into another browser).**

The first page you should see is the dialog box asking you to authenticate with your email address.

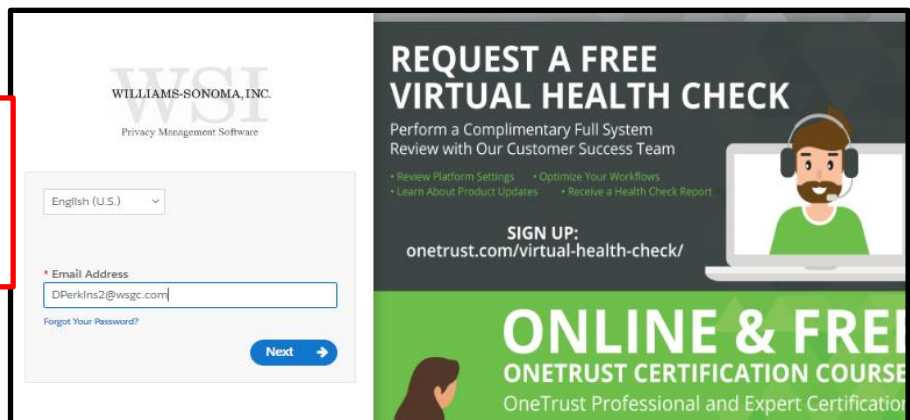


Figure 1 Login Screen

## Choosing an Assessment Template

After you authenticate, you will see the Self-Service Portal, Figure 2.

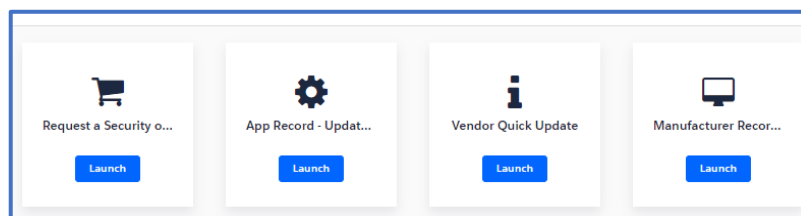


Figure 2 Self-Service Portal

After you authenticate, you should see the OneTrust Self-Service Portal like **Figure 2**. Existing assessments will also appear on the page. Select the “Launch” button under the assessment template using **Table 1** to determine which assessment template.

Note: If you do not see a screen like **Figure 2**, select the icon that looks like a waffle in the top left corner next to the house icon, and then select “Self-Service Portal”).

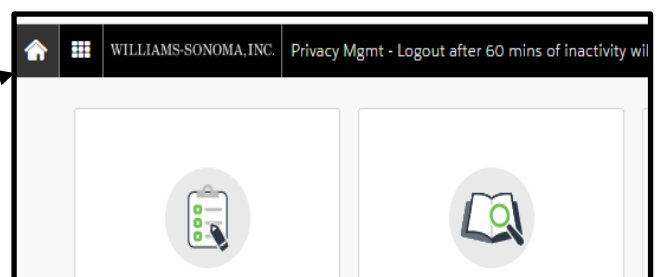


Figure 3 “Waffle”

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Select the blue "Launch" button based on what type of record you will be adding or updating using the criteria listed below.

Table 1 Assessment Template Description

**Vendor Quick Update** (the ⓘ) If you want a form to update an External Partner's record such as changing the agreement status.

**Request a Security or Agreement Review** (the 🛒) If you have an External Partner that needs a security review. (Note: new agreements (engagements) for a new or existing External Partner requires a security).

**App Record: Update Compliance Fields** (the ⚙️) if you want to update the ServiceNow application CI compliance fields.

**Manufacturer Record Add/Update** (the 🖨️) If you want to update the ServiceNow application CI's compliance/security fields.

## Choosing the Primary Record

The Primary Record is where you enter the name of the **External Partner, Manufacturer, or Application CI**. If you select any template other than the Request a Security or Agreement Review template, you will then see a prompt asking for the primary record, as illustrated in Figure 4. As you type, existing records will appear in the dropdown list.

Figure 4 Launch Assessment Page

Select **Launch** to begin the assessment resulting in a page like Figure 7. **Note:** If you do not want to add or update the vendor or manufacturer record, **Cancel** the assessment instead of

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If you are requesting a security or agreement review, you will see something like Figure 5 or Figure 6.

## New Security Compliance Agreement Review

Security or agreement reviews (new Engagements) must be initiated or requested via OneTrust. Engagements describe the way in which services are provided by an External Partner. Engagements can include services such as consulting, support, implementation, and more. Engagements agreement types include, but are not limited to, Master Service Agreements (MSA), Amendments to existing MSAs, Proof of Concepts (POC), Statement of Works (SOW), or any agreement that ordinarily requires data security and privacy language.

The screenshot shows the 'Add New Engagement' form. Fields include: Engagement Name (New Engagement with New External Partner), Engagement Organization (Williams-Sonoma Inc), Engagement Type (Vendor Engagement), Engagement Start Date (06/01/2023), Engagement End Date (06/01/2026), Engagement Vendor (New External Partner), and Services (PLEASE LEAVE BLANK). A dropdown menu for the Engagement Vendor is open, showing 'New External Partner' and 'Add: New External Partner' (circled in red). A red arrow points from the circled option to the 'Add: New External Partner' text in the Services field. A red box around the Services field contains the text 'Please leave Services field'.

Figure 5 New engagement for new External Partner

As you type a name, a dropdown list will appear. If the record exists, select the record. If the record does not exist, use the “**Add Option**” to create a new External Partner

After you complete the required fields (Engagement name, Engagement Type and Engagement Vendor), the blue “Launch” button will be visible. Select Launch to begin the assessment. Most of the questionnaire will be

The screenshot shows the 'Add New Engagement' form for an existing partner. Fields include: Engagement Name (New Engagement for Existing External Partner), Engagement Organization (Williams-Sonoma Inc), Engagement Type (Vendor Engagement), Engagement Start Date (05/01/2023), Engagement End Date (05/01/2024), Engagement Vendor (2-3-23 Existing External Partner | Williams-Sonoma Inc | Unknown), Engagement Internal Owner (Dee Dee Perkins), Engagement External Contact (vendoremail@vendordomain.com), Engagement Notes (Notes), and Engagement Scope (Scope).

Figure 6 New engagement for an existing External Partner

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## Navigating the Assessment

Request New Security Compliance Review

Show All Questions

Welcome

General Information

- 1.1 What is the name of the External Partner?
- 1.2 WSI Business/Relationship Owner
- 1.3 WSI Relationship Owner Business Phone

External Partner or Organization Information

Engagement Information

Link or Review External Partner's Application(s)

1.1 \*What is the name of the External Partner?

Select from the dropdown or add a new external partner name if not present

2-3-23 New External Partner | Williams-Sonoma Inc | Unknown

This question has been pre-populated based on the primary record and is disabled.

1.2 \*Who in the business is responsible for managing the relationship with the vendor?

Dee Dee Perkins

Justify or Explain your answer below.

Enter Justifications here.

Use the list on the left panel or arrows at the bottom right corner of the page to navigate through the questions

If the "Submit" button in the bottom right corner of the assessment is not blue, then there is a response missing from one or more questions; access missing required responses by clicking on the "\*" in the red ellipse in the left side panel.

Figure 7 Assessment Questionnaire

## Adding an Application or Configuration Item (CI)

If there is an application (on-premise, cloud, or hybrid) associated with your vendor, you will need to add the application or CI into ServiceNow. If you are unfamiliar with this process, please review the [MP4 video](#) demonstration of adding an application into ServiceNow.

## Submitting Assessment to Compliance Team

After you complete the assessment questionnaire and have entered all required fields, the blue "Submit" button will be visible in the bottom right corner of the assessment as shown in Figure 5 above. If the button is not blue, then there is a response missing on one or more of the required questions. Access the missing questions by clicking on the red star in the left side panel.

After submitting the form, Security Compliance will receive a notification that your assessment is ready for review. If everything looks good, the Compliance Team assessment Approver will send a notification (via OneTrust) that the assessment was approved. If more information is needed, the Security Compliance assessment Approver will send the assessment questionnaire back to you with feedback or instructions on what additional information is needed.

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**Note:** if the External Partner has access to WSI data including associate credentials, the Security Compliance assessment Approver will send the External Partner a Security Assessment.