Using Commonwealth Meridian to Manage User Access and Workflows
Course Information Sheet

Operational risk is a key risk in any Debt Management Office (DMO). Implementing sound internal user access and workflow controls in a DMO's debt management system helps to reduce the risk of errors, policy breaches, and fraudulent behaviour.

This course is targeted at system administrators who are responsible for setting up users and authorisation levels and are using or plan to use Commonwealth Meridian, the Commonwealth Secretariat's Public Debt Management System.

This course covers operational risk concepts, user management, workflow management, and using reporting tools in Commonwealth Meridian to assess operational risk.

Prerequisite

No pre-course materials are recommended. Learners are however expected to be working with or in a Debt Management Office or plan to be working with or in a Debt Management Office that is using Commonwealth Meridian.

Essential Reading

There is no essential reading required as a prerequisite to this course. Learners are however expected to have knowledge of public debt management office internal controls.

Assessment

Learners will demonstrate successful achievement of these objectives by achieving at least 80% in the final assessment.

Learners will be required to use Commonwealth Meridian to answer the questions in the assessment. Learners will be provided with a web address to connect to Commonwealth Meridian as well as a unique username and password.

Learning Outcomes

On completion of the course, learners will be able to:
*   Describe the scope, functionality, and key benefits of using Commonwealth Meridian.

*   Log in to Commonwealth Meridian and understand how to navigate to modules and functions and use generic features to find records.

*   Understand how users are setup in Commonwealth Meridian to reduce operational risk.

*   Understand how workflows can be configured in Commonwealth Meridian to manage operational risk.

*   Use the dashboard and reports to assess operational risk.

*   Understand what reporting tools are available in Commonwealth Meridian.

*   Generate Standard Reports.

*   Configure and generate aggregate reports using the Aggregate Report Wizard.

Queries and Support

Please contact the eLearning support team for any queries or support at:
 e-csdms@commonwealth.int

Visit https://cwlearn.commonwealth.int/ for other available courses.

Course Outline

The course is comprised of 6 topics:

Topic 01: Introduction to Commonwealth Meridian
In this topic, learners will understand how Commonwealth Meridian is used in a Debt Management Office. The topic also covers (i) the scope and benefits of using Commonwealth Meridian, (ii) key features, (iii) how to navigate to modules and functions and find records and, (iv) setting up system settings to enhance the usability of Commonwealth Meridian.

Topic 02: Introduction to Operational Risk
In this lesson you will learn about operational risk, its relevance to public debt management, and how Meridian helps with managing certain kinds of operational risk in debt management operations.
By the end of this lesson, you should be able to identify ways in which Commonwealth Meridian can be used to manage operational risk in the debt operations.

Topic 03: User Management
This topic provides an overview of user management, explaining how setting up workgroups, user roles and portfolios correctly, can reduce operational risks. Learners will also learn how to set-up users and their access levels based on their given job functions.

Topic 04: Workflow Management
The learner is introduced to workflow management and how it is an integral part of operational risk management. Creating/modifying debt instruments and payments administration are used in this topic to explain how workflows are configured and managed.

Topic 05: Using the Dashboard and Reports to Manage Operational Risk
This topic explains how the dashboard and workflow management reports are an integral part of operational risk management. Learners are shown the key reports that can be generated to assess operational risk in relation to instrument management and payment administration.

Topic 06: Using the Standard Reports Tool
In this topic, learners are introduced to the Standard Reports in Meridian and will learn how to generate reports for various stakeholders.