Training Module
Focus Area: Main Menu

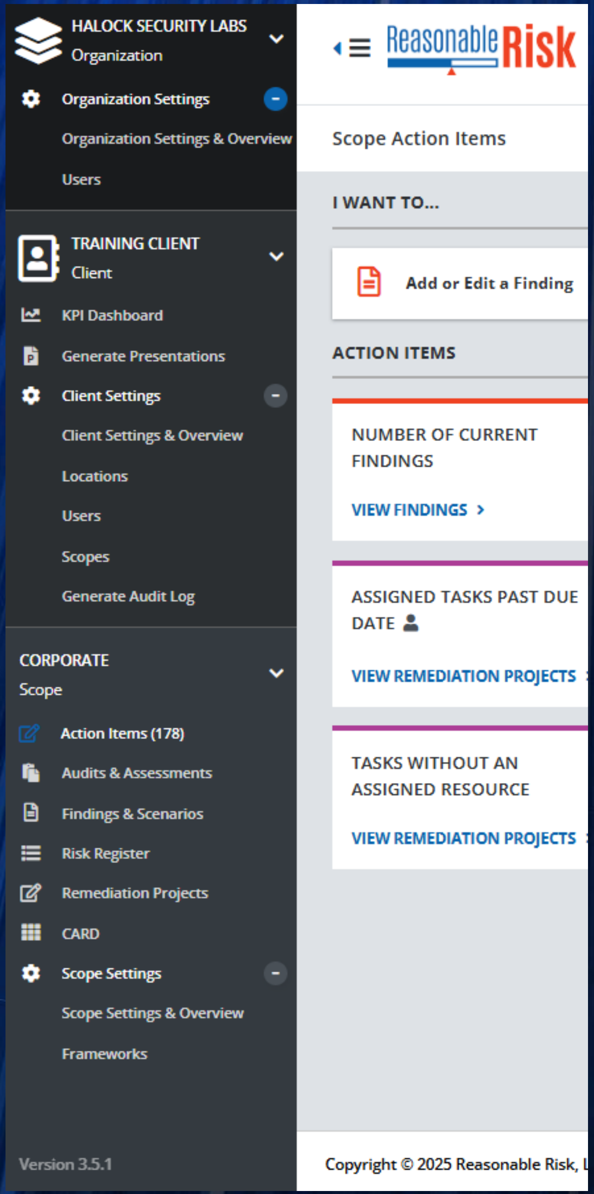
Main Menu

- Objectives:
  - Review and understand the main menu and options

Screen Narrative: Main Menu

Item	Narrative
Purpose(s)	• This is the main left main menu of the platform • Allows the user to navigate to all areas of the platform
High Level Description	This is the main left menu of the platform and directs the user to the various areas of the system. There may be areas exposed based on the permissions of the user.
Detailed Description/Workflow	The main menu is almost always available to the user. When it is not, it is because there is a pop up menu that take precedence.
How this screen fits into the overall risk lifecycle	The menu itself does not fit into the overall risk lifecycle, but knowing the areas of the risk lifecycle allows the user to drive risk remediation by going to the various areas of the platform.

Screen Visual: Main Menu



Screen Review: Main Menu

Screen: Main Menu
Navigation Notes: Selections from the left menu, depending on your permissions

Field/Action/Selection	Description	Best Practice
Organization: Organization Settings & Overview	Used by the integrator to provide the organization name, user access and initial CARD likelihood.	Depending on your permissions you might not even see this.
Organization Settings: Users	Used by the integrator to add users to the organization and to send them invitations.	Depending on your permissions you might not even see this.
Client Menu: KPI Dashboard\Scope	Pull down selection to the appropriate scope to reflect the charts that you're going to see.	The charts only reflect one scope at a time.
Client Menu: KPI Dashboard	This consists of several graphs that show progress over time and your risk program key performance indicators. **Charts Included:** Program Progress Over time Planned vs. Actual Risk Reduction Risk Aging Risk Magnitude & Exposure Risk Score by Security Program	These charts are updated in real time when things change
Client Menu: KPI Dashboard\REFRESH CHARTS	Click this button to make sure that all of the changes that you have made in the current session are reflected in the online charts.	The database update is automatically done overnight, but if you want them to be reflected immediately in the online charts you must press the refresh charts button. When you are doing a presentation, the refresh charts button is "pressed" automatically before the presentation is run.

Screen Review: Main Menu

Screen: Main Menu
Navigation Notes: Selections from the left menu, depending on your permissions

Field/Action/Selection	Description	Best Practice
Client Menu: Generate Presentations	This menu item starts the presentations area which includes the budget request presentation and the executive status presentation.	You can run both presentation wizards from this menu selection.
Client Settings: Client Settings & Overview	This section has a lot of the setup information including the client overview, users and their access, as well as the CARD information, which is the likelihood, impacts and score ranges.	This is usually set up by your integrator.
Client Settings: Locations	These are the various locations of the client, there can be multiple locations.	When setting up a scope you have to select a particular location.
Client Settings: Users	Used by the integrator to add users to the client and to send them invitations.	Depending on your permissions you might not even see this.
Client Settings: Scopes	This provides a list of all of the scopes associated to the client.	You can select one scope at a time from the list.
Client Settings: Generate Audit Log	This creates a log of all of the activity that has taken place for the risk register for the current scope.	This is a downloadable Excel spreadsheet

Screen Review: Main Menu

Screen: Main Menu
Navigation Notes: Selections from the left menu, depending on your permissions

Field/Action/Selection	Description	Best Practice
Scope Menu: Action Items	Selection brings you back to the main action items homepage which shows all of the action panels and overall status.	Each panel is actually an automatic filter under the action items area.
Scope Menu: Audits & Assessments	Selection brings you to the list of all of the established audits and assessments and allows you to create additional ones.	Remember that the audits and assessments do not connect to the risk register they are just a series of reminders of the various audits and assessments that you have scheduled.
Scope Menu: Findings & Scenarios	Selection brings you to the findings and scenarios area, where you can see all of the established findings and scenarios.	Remember that the findings and scenarios are your sandbox and you can workshop risks in this area, they don't count in your risk register.
Scope Menu: Risk Register	Selection brings you to the risk register.	You can also get to the archived risks from this area as well.
Scope Menu: Remediation Projects	Selection will list all of the remediation projects and allow you to create additional projects.	This is a key area that many start with.
Scope Menu: CARD	Selection shows a pop up of the calculated acceptable risk definition.	You can actually also download it from this pop up well using the download icon button in the upper right corner.
Scope Menu\Scope Settings: Scope Settings & Overview	On scope creation, it mirrors all of the client setup and settings including the overview users and card information but it also includes new information such as framework settings and planning horizon information.	This area is not gone to very often after setup.
Scope Menu\Scope Settings: Frameworks	Selection lists the frameworks that have been selected in the scope settings and overview area, and allows you to review what those frameworks are, and how they are mapped to the common security program (CSP).	This area is not gone to very often after setup.