

Reasonable **Risk**[™]



Training Module *Focus Area: Action Items*

Action Items



- Objectives:
 - Review and understand action item panel tiles

Screen Narrative: Action Items

| Item | Narrative |
|---|---|
| Purpose(s) | <ul style="list-style-type: none">• Provide a quick action opportunity for users to access important areas of the platform.• Provide a quick action opportunity for users to access areas of the platform with automatic filters already selected• Provide visual cues regarding status of key areas of the platform• Provide quick action access to areas of the platform with the intention to drive user behavior |
| High Level Description | <p>This is the “action panel” or “home screen” of Reasonable Risk. The top portion is a basic repeat of many of the main menu functions “I want to...” However, the bottom “tiles” are meant to drive behavior. The numbers that are part of each of those tiles are indicators of actions that need to be taken care of, such as projects that need to be approved, tasks that need to be closed, etc. These action tiles are basically areas that when clicked are filters to those areas of the application.</p> |
| Detailed Description/Workflow | <p>Many users “start” at this screen all the time when they enter Reasonable Risk.</p> |
| How this screen fits into the overall risk lifecycle | <p>This screen does not fit into the risk lifecycle, but using it drives the risk lifecycle, as users see how many unacceptable risks, projects that need attention, etc.</p> |

Screen Visual: Action Items

The screenshot displays the Reasonable Risk dashboard. At the top left is the logo with a hamburger menu icon. The top right contains navigation links for Notifications (with a red '2' badge), Admin, Support, and the user profile 'GLENN STOUT (RR)'. Below the header is a 'Scope Action Items' section with a sub-header 'I WANT TO...' and six action buttons: 'Add or Edit a Finding', 'Add or Edit a Risk', 'Map a Risk to a Project', 'Add or Edit a Project', 'View the Scope CARD', and 'Generate Presentations'. The main 'ACTION ITEMS' section features a grid of seven cards, each with a title, a large number, and a 'VIEW REMEDIATION PROJECTS' link. The cards are: 1. 'NUMBER OF CURRENT FINDINGS' (0), 2. 'RISKS WITH AN UNACCEPTABLE SCORE' (132), 3. 'UNACCEPTABLE RISKS NOT MAPPED TO A PROJECT' (0), 4. 'TASKS APPROACHING OR PAST DUE DATE' (1), 5. 'ASSIGNED TASKS PAST DUE DATE' (0), 6. 'PROJECTS NEEDING APPROVAL' (13), 7. 'PROJECTS THAT NEED TO BE COMPLETED' (15), and 8. 'TASKS WITHOUT AN ASSIGNED RESOURCE' (15).

Reasonable Risk

NOTIFICATIONS ADMIN SUPPORT GLENN STOUT (RR)

Scope Action Items

I WANT TO...

- Add or Edit a Finding
- Add or Edit a Risk
- Map a Risk to a Project
- Add or Edit a Project
- View the Scope CARD
- Generate Presentations

ACTION ITEMS

| | | | |
|--|---|--|---|
| NUMBER OF CURRENT FINDINGS 0 VIEW FINDINGS > | RISKS WITH AN UNACCEPTABLE SCORE 132 VIEW RISKS > | UNACCEPTABLE RISKS NOT MAPPED TO A PROJECT 0 VIEW RISKS > | TASKS APPROACHING OR PAST DUE DATE 1 VIEW REMEDIATION PROJECTS > |
| ASSIGNED TASKS PAST DUE DATE 0 VIEW REMEDIATION PROJECTS > | PROJECTS NEEDING APPROVAL 13 VIEW REMEDIATION PROJECTS > | PROJECTS THAT NEED TO BE COMPLETED 15 VIEW REMEDIATION PROJECTS > | OPEN PROJECTS PAST ESTIMATED COMPLETION DATE 0 VIEW REMEDIATION PROJECTS > |
| TASKS WITHOUT AN ASSIGNED RESOURCE 15 VIEW REMEDIATION PROJECTS > | | | |

Screen Review: Action Items

Screen: (Scope) Action Items

Menu Selection: Action Items

Navigation Notes: Left Menu → Action Items

| Field/Action/Selection | Description | Best Practice |
|---|--|--|
| I want to... Add or Edit a Finding | Takes the user to the menu area of findings and scenarios. | It's the same as going under the left menu of findings and scenarios |
| I want to... Add or Edit a Risk | Takes the user to the risk register listing. | It's the same as going under the left menu to the risk register. |
| I want to... Map a Risk to a Project | This takes the user to this function of mapping risks to projects. | For a risk to be closed, it needs to be mapped to a project. |
| I want to... View the Scope CARD | Shows the user the Calculated Acceptable Risk Definition (CARD). | Users can also download the card from this pop-up. |
| I want to... Generate Presentations | This is the reporting area for the Budget Request Report and the Executive Status Report – both MS PowerPoint presentations. | There is a “wizard” that allows for date customization. |
| ACTION ITEMS: Filter | This pop up filter allows the user to customize what tiles they wish to see. | They are in categories of Findings, Risks, Projects and Tasks. |
| ACTION ITEMS: Number of Current Findings | Takes the user to a filtered list of the current findings. | Findings do not count as risks, they need to be promoted to the risk register once approved. |
| ACTION ITEMS: Risks with an Unacceptable Score | Takes the user to a filtered list of risks that have an unacceptable score. | This is a main number to review – the team wants this number to go down over time as risks are remediated. |

Screen Review: Action Items

Screen: Action Tiles

Menu Selection: Action Items

Navigation Notes: Action Items

| Field/Action/Selection | Description | Best Practice |
|---|--|--|
| ACTION ITEMS: Unacceptable Risks not Mapped to a Project | Shows a filtered list of risks that are unacceptable, and not mapped to a project. | This is important because all unacceptable risks need to be mapped to a project so they can be remediated. |
| ACTION ITEMS: Tasks Approaching or Past Due Date | Shows a filtered projects list where the tasks are past the due date or are within a week of the due date. | This is in the remediation projects area – and completes the filter accordingly. |
| ACTION ITEMS: Assigned Tasks Past Due Date | Shows a filtered projects list where the tasks are past the due date. | This is in the remediation projects area – and completes the filter accordingly. |
| ACTION ITEMS: Projects Needing Approval | Shows a filtered list of all projects that are not approved. | To follow best practice, all projects should be approved before they are actively worked on. |
| ACTION ITEMS: Projects that Need to be Completed | Shows a filtered list of open projects. | Projects can be open or closed. Closed projects are completed. |
| ACTION ITEMS: Open Projects Past Estimated Completion Date | Shows a filtered list of projects where the estimated completion date has passed. | This drives behavior – if we know what projects are past the estimated completion date. |
| ACTION ITEMS: Tasks Without an Assigned Resource | Shows a filtered projects list where there are tasks without an assigned resource | This is in the remediation projects area – and completes the filter accordingly. |