

# Reasonable **Risk**<sup>™</sup>

The logo for Reasonable Risk features the word "Reasonable" in white and "Risk" in orange. Below the text is a stylized orange scale of justice, with a horizontal bar and a triangular weight hanging from the center.

*Training Module*

*Focus Area: Remediation Project Tasks*

# Agenda

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## Topic – Remediation Project Tasks

# Tasks

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- Objectives:
  - Review and understand tasks list/search bar
  - Create Task
  - Understand fields of a task
  - Understand how to connect risks to a task
  - Understand how to create a task from a risk
  - Understand how to view and open a task from a risk
  - Understand how to comment on a task

# Modules

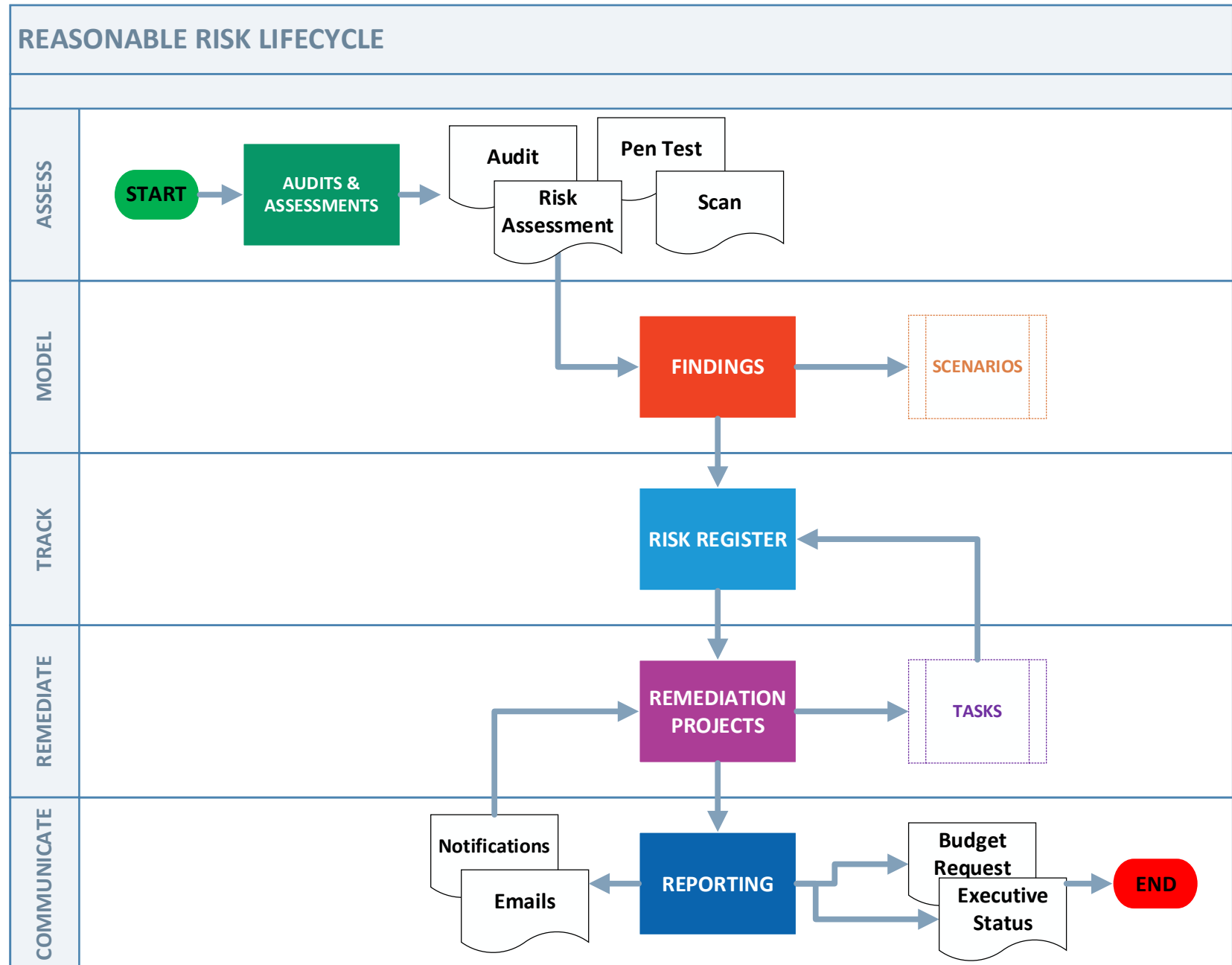
**Audits & Assessments** allow you to plan and monitor the periodic activities and assessments normally associated with a security program.

**Findings & Scenarios** provide a safe place to allow for the modeling of safeguard control use cases without impacting the **Risk Register**. Items can be manually input or imported from an external source.

The **Risk Register** tracks identified risks, recording the initial and safeguard risk score and associated details. Risks are created by promoting a **Finding** or **Scenario**, they may be also be manually input or imported from an external source.

**Remediation Projects** are created to group and manage implementation of safeguard controls for **Risks**. **Tasks** are time bound activities or milestones required to reduce Risks to an acceptable level.

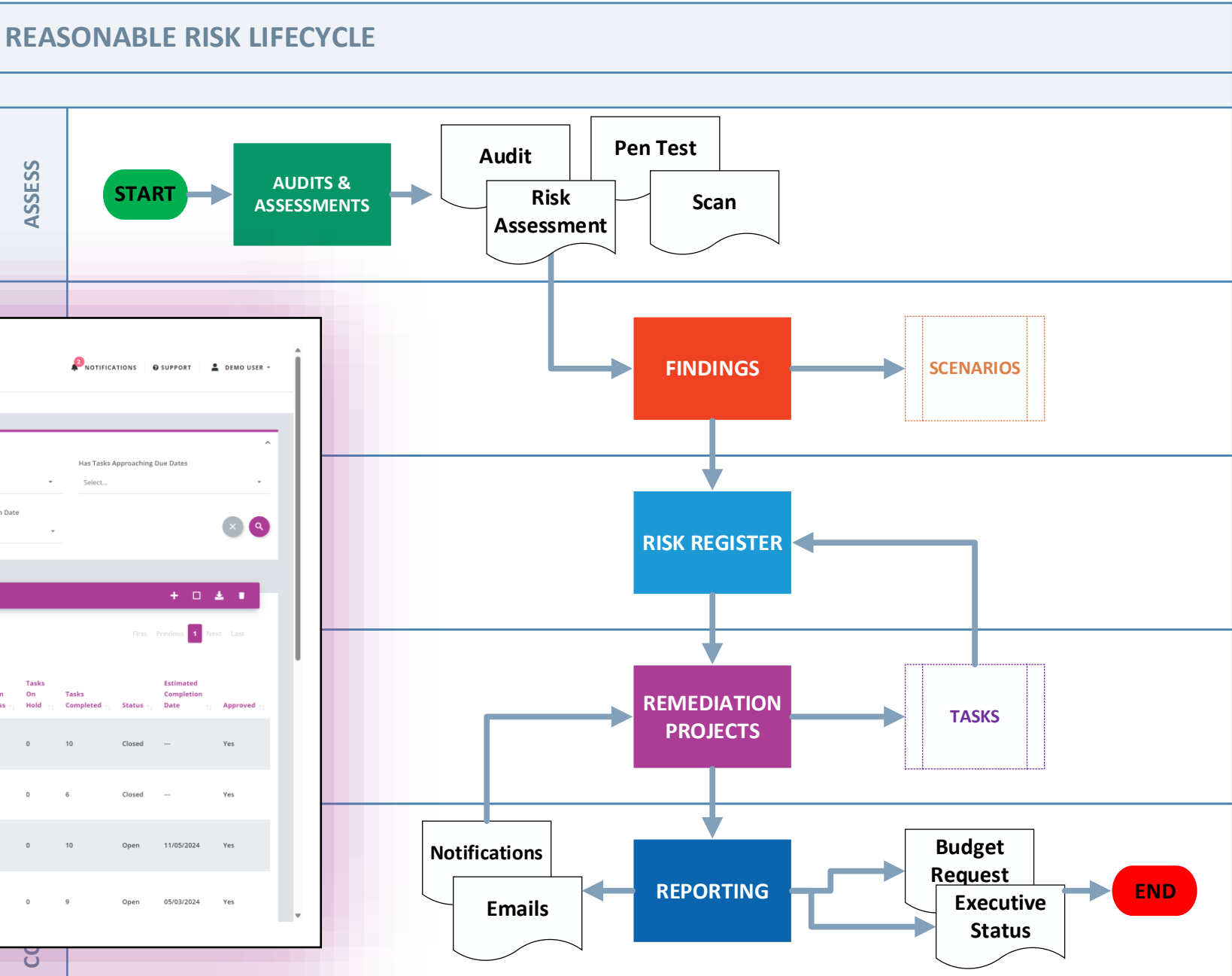
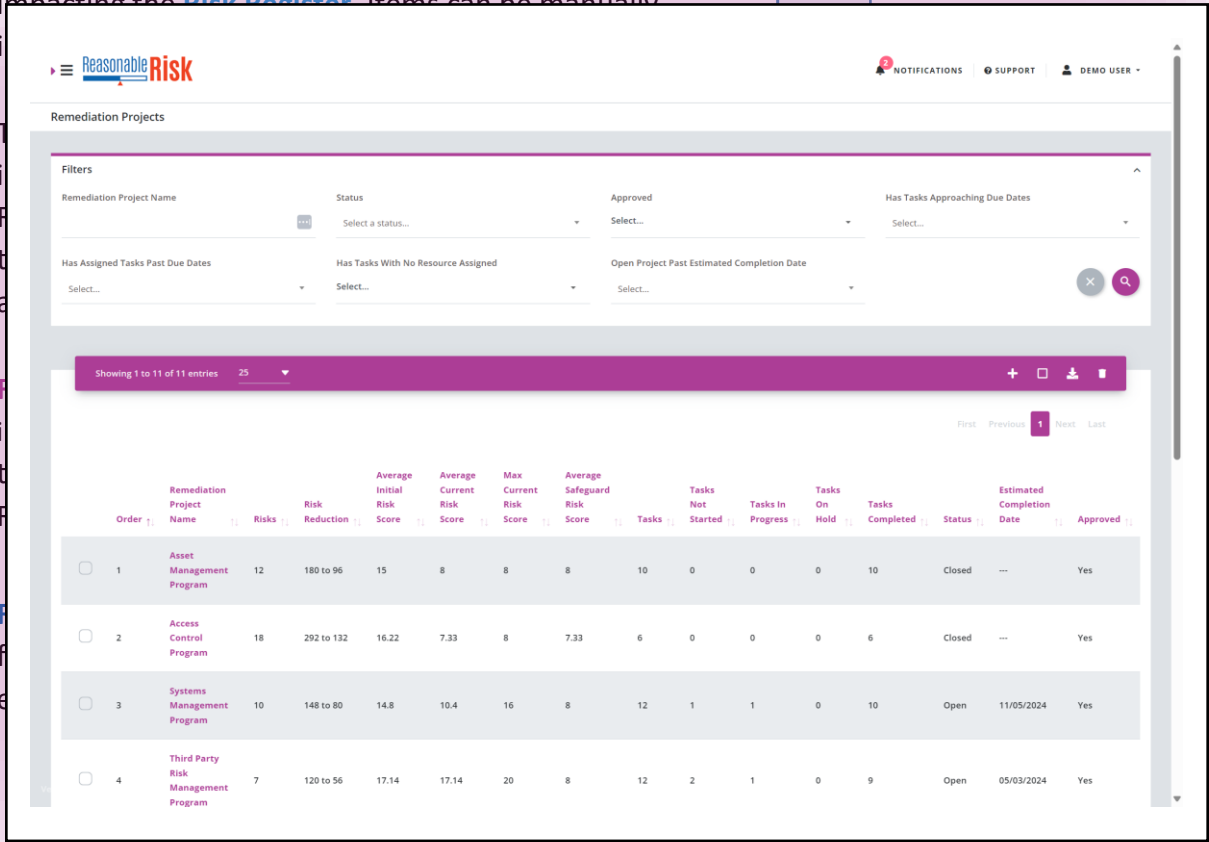
**Reporting** provides a consistent and efficient process for generating executive level communications in an editable PowerPoint deck.



# Modules

**Audits & Assessments** allow you to plan and monitor the periodic activities and assessments normally associated with a security program.

**Findings & Scenarios** provide a safe place to allow for the modeling of safeguard control use cases without impacting the **Risk Register**. Items can be manually



# Remediation Projects – Tasks – Overview

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Tasks are created within projects to move tasks to remediation.

They are standard, project type activities that teams would create, regardless if they were using Reasonable Risk or a clipboard with a pad of paper – tasks need to be created for the job to get done!

The difference here is that RISKS can be linked to tasks, where if a particular task is completed, a risk can be partially or completely closed.

Setting tasks up, and connecting them to risks is what needs to be done in order to properly get the Budget Request presentation in order, as a best practice, to get projects approved for timing and budget.

However, in the most simple approach, it is a “work list” of things that need to get done to remediate the risks we have identified for this particular project.

# Tasks - Workflow

The project is created – and risks are mapped to the project.

Based on those risks – TASKS are now created in order to remediate those risks.

## Task Status:

- Not Started
- In Progress
- On Hold
- Complete

A Risk can be mapped to multiple tasks, as it may take many tasks to remediate a risk.

Once all associated tasks to a particular risk are complete – teams can close that risk!

# Tasks - Workflow

Tasks can be created 2 ways:

1) From the Tasks section:

- Select the “+” sign to create the task
- Create the task as normal

2) From within a Risk in the Risks Section

- Using the “three dot” menu on an associated risk within a remediation project, one of the menu items is “Create Task”
- A pop-up window will have the task screen for completion
- The only difference is that this screen has the associated risk already populated within it

# Screen Narrative: Tasks

| Item  | Narrative  |
|---|--|
| <b>Purpose(s)</b>   | <ul style="list-style-type: none"><li>• Create Task</li><li>• Understand fields of a task</li><li>• Understand how to connect risks to a task</li><li>• Understand how to create a task from a risk</li><li>• Understand how to view and open a task from a risk</li></ul> |
| <b>High Level Description</b>                               | Summary of Tasks presenting the assigned resources, start dates, status, reoccurrence, and the existence of comments.  |
| <b>Detailed Description/Workflow</b>                        | Reoccurrence setting,<br>Start and End dates,<br>Assigned Resource(s) and estimated effort,<br>Status, and<br>Budget Information   |
| <b>How this screen fits into the overall risk lifecycle</b> | Risks are associated to tasks. It is imperative that a risk is associated to at least one task. It is permitted to associate a risk to multiple tasks if necessary.  |

# Screen Review: Tasks

## Screen: Tasks

### Menu Selection: Remediation Project - Tasks

Navigation Notes: Remediation Projects → Choose any project → Top Menu Selection - Tasks

| Field/Action/Selection              | Description  | Req? | Best Practice   |
|-------------------------------------|--|------|---|
| Task Name                           | The name of the task   | YES  |   |
| Task Description                    | Some additional description of the task  | YES  |   |
| Associated Risk ID(s)               | Select associated risks (if any)   | NO   | You can select as many as you wish. The UI is a little tricky for multiple risk selection, just give it a second to populate the list before selecting the second, third, risks, etc. |
| Reoccurrence Setting                | Pull down selection of: None, Daily, Weekly, Monthly – If the task was reoccurring.  | NO   | FIELD NOT USED  |
| Start Date                          | Start date of task   | NO   |   |
| End Date                            | End Date of Task   | A    |   |
| Resource(s)                         | Select one or many resources that will work on the task  | NO   | Each will get an email – you can only select those that have a Reasonable Risk account  |
| Daily Resource % Effort of Resource | Pull down selection of: N/A, Less than 25%, Between 26%-50%, and Between 51% -75%. Used if a heavy task and it would require a dedicated resource. | NO   | Not a heavily used field to date.   |
| Status                              | Not Started, In Progress, On Hold, Complete  | NO   |   |
| Percent Complete                    | Free text field to enter a number between 1 and 100  | NO   | It is not an automatic calculated field.  |

# Screen Review: Tasks

## Screen: Tasks

### Menu Selection: Remediation Project - Tasks

Navigation Notes: Remediation Projects → Choose any project → Top Menu Selection - Tasks

| Field/Action/Selection            | Description  | Req? | Best Practice   |
|-----------------------------------|--|------|---|
| Initial Implementation Hard Costs | Enter in the Initial Implementation Hard Costs that this task will cost. | YES  | Hard costs are where a company has to do a cash outlay to a product or service (generally speaking).  |
| Initial Implementation Soft Costs | Enter in the Initial Implementation Soft Costs that this task will cost. | YES  | Soft costs are generally in terms of internal costs. If teams don't measure internal hours, sometimes use an internal hourly rate, or maybe hours, such as 1 hour for an hour needed. |
| Ongoing Yearly Hard Costs         | Enter in the Ongoing Yearly Hard Costs that this task will cost.         | YES  | If cash payment is needed annually, such as a subscription service.   |
| Ongoing Yearly Soft Costs         | Enter in the Ongoing Yearly Soft Costs that this task will cost.         | YES  | If time from an internal resource is needed annually, such as to review something for 8 hours a month, it could be reflected here for budget reasons.                                 |
| Created By:                       | Read only field, displays who created the task.                          | N/A  |   |
| Modified By:                      | Read only field, displays who last modified task.                        | N/A  |   |
| Created On:                       | Read only field, displays date created.                                  | N/A  |   |
| Modified On:                      | Read only field, displays last date modified.                            | N/A  |   |
| ACTION: Cancel                    | Will cancel and not save the Task  | N/A  |   |
| ACTION: Save & Close              | Will Save task and close the window                                      | N/A  |   |

# Screen Visual: Task

Edit Task | Establish Data Classification Scheme CANCEL SAVE & CLOSE

**Overview:**

|  |  |  |   |
|--|--|--|---|
| <b>Task Name *</b><br>Establish Data Classification Scheme | <b>Task Description *</b><br>Develop data class matrix based on requirements | <b>Associated Risk ID(s)</b><br>× Risk 19   Establish and Maintain a Data... ×<br>× Risk 13   Establish and Maintain a Data... ▼ | <b>Reoccurrence Setting</b><br>None × ▼               |
| <b>Start Date</b><br>📅 04/23/2025                          | <b>End Date</b><br>📅 05/30/2025  | <b>Resource(s)</b><br>Select resource(s)... ▼  | <b>Daily Resource % Effort of Resource</b><br>N/A × ▼ |
| <b>Status</b><br>In Progress × ▼                           | <b>Percent Complete</b><br>20  |  |   |
| <b>Budget Information</b>                                  |  |  |   |
| <b>Initial Implementation Hard Costs *</b><br>\$ 500.00    | <b>Initial Implementation Soft Costs *</b><br>\$ 2000.00                     | <b>Ongoing Yearly Hard Costs *</b><br>\$ 0.00  | <b>Ongoing Yearly Soft Costs *</b><br>\$ 0.00         |
| <b>Created By:</b> gstout@reasonablerisk.com               | <b>Modified By:</b> gstout@reasonablerisk.com                                |  |   |
| <b>Created On:</b> 4/23/2025 2:11:11 AM                    | <b>Modified On:</b> 4/23/2025 2:11:11 AM                                     |  |   |

# Add Tasks to Remediation Projects

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- Tips

- Take a moment to think about all of the tasks that you think will take care of the risk in question. Write them out before you get them into RR (or to get into the import template) in order to flesh them out well.
- You can IMPORT tasks! There is a downloadable spreadsheet – easy to flesh out the framework of your tasks. While there will be more task editing to do after import – you can get the ball rolling with an import. Additionally, if you have a standard set of tasks that you want per project, you can introduce some consistency across your projects.
- Try to keep the task name short – expand the detail in the task description.
- If you don't know any budget information, you can enter 0. But if you can even estimate the number of hours it will take to execute the task (such as internal hours), you can use that value – based on internal bill rate – to get some value in place (Note: this is not an importable field – can be updated later).

# Edit Task Detail

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- Other features of tasks:
  - You can **DOWNLOAD THEM!** If you need to get a list of tasks to perhaps a non-system user, or to look at them a different way – they can be exported into a spreadsheet.
  - You can **DELETE THEM!** Under certain conditions, tasks can be deleted (they cannot be “complete”)

# Add comments to Tasks

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- To move tasks along, we may have intermediate comments regarding the tasks as they are being completed.
- Tips
  - Comments build where you can see the progress of the task efforts.
  - When a task is completed, suggest that you add a comment about how it was completed, or any status change for that matter.
  - This is a rich text field – so you can use bullet points, numbered lists, bold, italics – even a clickable link!
  - The name of the commenter, time and date is stored with the comment, cannot be edited.
- Comments are created via the “three dot menu” to the far right of every task

# Screen Narrative: Task Filter/Task List & Action Bar

| Item  | Narrative   |
|---|---|
| <b>Purpose(s)</b>   | <ul style="list-style-type: none"><li>• Review and understand tasks list/search bar</li><li>• Understand how to comment on a task</li></ul>   |
| <b>High Level Description</b>                               | Within each project there tasks that drive risks to remediation. To find and filter tasks, there is a filter on top, and a list of tasks with sorting built into it, and an action bar that can act on one or more tasks.   |
| <b>Detailed Description/Workflow</b>                        | The upper part of the screen is the filter that is used to filter out tasks to show only the desired tasks. The action bar is used to select tasks for actions, such as delete. Upload of tasks and download of tasks area also available (the task name and detailed description). |
| <b>How this screen fits into the overall risk lifecycle</b> | Risks are associated to tasks. It is imperative that a risk is associated to at least one task. It is permitted to associate a risk to multiple tasks if necessary.   |

# Screen Review: Task Filter

**Screen: Task Filter**

**Menu Selection: Remediation Projects**

**Navigation Notes: Remediation Projects → Select a Project → Top Menu – click Tasks**

| Field/Action/Selection           | Description   | Best Practice  |
|----------------------------------|---|--|
| <b>Action:</b> Carat Upper Right | Expands and collapses entire filter panel   | If not needed, you can collapse to provide more screen real estate.  |
| Task                             | Filters on the task name  | Probably the most commonly used.   |
| Resource                         | Will provide a pull-down selection of all available named resources that are assigned tasks within the project. | You can select multiple resources – if you select multiple – it is considered to be an “OR” selection – where if you select 2 resources, if a task has only 1 of them, it will appear in the filter. |
| Risk ID                          | Will provide a pull-down selection of all available named risks within the project.                             | You can select multiple risks – if you select multiple – it is considered to be an “OR” selection – where if you select 2 risks, if a task has only 1 of them, it will appear in the filter.         |
| <b>ACTION:</b> Cancel            | Will Clear filter   | Resets everything to the default – when you click it - you have to hit the magnifying glass again.   |
| <b>ACTION:</b> Magnifying Glass  | Will execute the search/filter  | Will show results of filter in the list below.   |

# Screen Review: Task Action Bar and List (1 of 2)

## Screen: Task Action Bar and List

### Menu Selection: Remediation Projects

Navigation Notes: Remediation Projects → Select a Project → Top Menu – click Tasks

| Field/Action/Selection              | Description   | Best Practice   |
|-------------------------------------|---|---|
| Showing X of Y entries              | Shows a number of entries on the page. Shows the number of entries out of the total number of possible entries in the series.   | The default is 25.  |
| Action: Square Selection            | Click the plus sign to add a new task.  | This is another way to add a task.  |
| Action: "+" (Add)                   | Select this box to select "all" in the current view.  | This will only select those that are currently displayed.   |
| Action: Upload Symbol               | Will provide an opportunity to upload tasks. Will direct you to a different screen with a chance to (ACTION) <b>Download Import Template</b> , complete it, and CHOOSE FILE to upload tasks. Then IMPORT action button. | The Task Name, Task Description and Percent Complete are the three fields that can be imported.           |
| Action: Download Symbol             | Will download all, whether selected or not.   | They do not have to be selected to be downloaded, they will be downloaded into a .csv file.               |
| Action: Garbage Can Symbol (delete) | Need to select a task first to delete it.   | Will delete a task  |
| Header: Selection Box               | Check this box to select the row.   | If you select multiple boxes, you can take actions on multiple items at once, if allowed, such as delete. |
| Header: Order                       | This is the order that the element is in, shows a number. This column has an arrow by is and is sortable.   | You can click this and sort it back and forth.  |
| Header: Task                        | Displays Task Name  | Sortable  |
| Header: Resource(s)                 | Displays all named resources assigned to the task   | Sortable  |

# Screen Review: Task Action Bar and List (2 of 2)

| Field/Action/Selection                            | Description  | Best Practice  |
|---|--|--|
| Header: Daily Resource %                          | Shows Daily Resource % for the task  | Sortable   |
| Header: Start Date                                | Shows Start Date   | Sortable   |
| Header: End Date                                  | Shows End Date   | Sortable   |
| Header: Status                                    | Shows Status   | Sortable   |
| Header: Percent Complete                          | Shows Percent Complete   | Sortable   |
| Header: Risks                                     | Shows number of risks associated to the task   | Sortable   |
| Header: Risk ID(s)                                | Shows Risk ID(s) of risks associated to the task   | Sortable   |
| Header: Recurring                                 | Shows Recurring Yes or No for the task   | Sortable   |
| Header: Initial Implementation Costs (Hard Costs) | Shows cost for this category for the task.   | Sortable   |
| Header: Initial Implementation Costs (Soft Costs) | Shows cost for this category for the task.   | Sortable   |
| Header: Ongoing Yearly Costs (Hard Costs)         | Shows cost for this category for the task.   | Sortable   |
| Header: Ongoing Yearly Costs (Soft Costs)         | Shows cost for this category for the task.   | Sortable   |
| Header: Total Costs                               | Shows total costs for the task   | Sortable   |
| ACTION: Three Dot Menu: Comments                  | The opens a new screen with rich text comments, allows for a rolling comments pertaining to the task.                            | Some teams use this with rolling comments instead of many tasks. |
| ACTION: Three Dot Menu Move to Position           | When selected, shows a pop up of the current order of this task – allows user to change the order to whatever position you wish. | This allows you to put tasks in whatever order is best.          |

# Screen Visual: Task Filter/Task List & Action Bar

**Filters**

Task

Resource

Risk ID

Showing 1 to 10 of 10 entries 1 row selected 25




First Previous **1** Next Last

| Order                               | Task | Resource(s)        | Daily Resource % | Start Date | End Date   | Status     | Percent Complete | Risks | Risk ID(s) | Reoccurring | Initial Implementation Costs (Hard Costs) | Initial Implementation Costs (Soft Costs) | Ongoing Yearly Costs (Hard Costs) | Ongoing Yearly Costs (Soft Costs) | Total Costs |  |
|-------------------------------------|------|--------------------|------------------|------------|------------|------------|------------------|-------|------------|-------------|---|---|-----------------------------------|-----------------------------------|-------------|--|
| <input checked="" type="checkbox"/> | 1    | Policy Development | Demo User        | N/A        | 10/02/2023 | 10/20/2023 | Complete         | 100%  | 0          | No          | \$0.00                                    | \$0.00                                    | \$0.00                            | \$0.00                            | \$0.00      | <input type="button" value="v"/>   |
| <input type="checkbox"/>            | 2    | Policy Review      | Demo User        | N/A        | 10/18/2023 | 10/27/2023 | Complete         | 100%  | 0          | No          | \$0.00                                    | \$0.00                                    | \$0.00                            | \$0.00                            | \$0.00      | <input type="button" value="Comments"/><br><input type="button" value="Move to Position"/> |

# Screen Visuals: Task Comment & HTML Pop Up

Comments | Policy Development CANCEL SAVE & CLOSE

Comment \*

**B** *I*   

SUBMIT

Insert/Edit Link ×

URL

Text to display

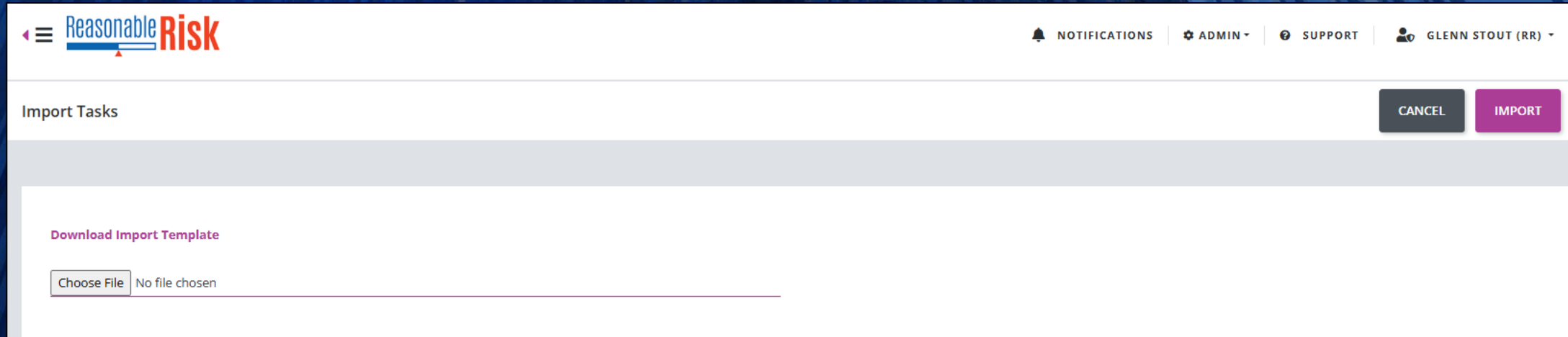
Title

Open link in...

Cancel Save

When the three-dot menu is selected and the COMMENTS selection is made, this pop up appears and running comments about a task can be made. HTML links can also be included.

# Screen Visuals: Import Task



The screenshot shows the 'Import Tasks' page in the Reasonable Risk application. At the top left is the 'Reasonable Risk' logo. The top right navigation bar includes 'NOTIFICATIONS', 'ADMIN', 'SUPPORT', and the user profile 'GLENN STOUT (RR)'. Below the navigation bar, the page title 'Import Tasks' is on the left, and 'CANCEL' and 'IMPORT' buttons are on the right. The main content area features a 'Download Import Template' link. Below this link is a file selection interface with a 'Choose File' button and the text 'No file chosen'.

To import tasks, click the **DOWNLOAD IMPORT TEMPLATE** – and a very simple import template in EXCEL is downloaded. There are only three fields that can be imported – **TASK NAME**, **TASK DESCRIPTION** and **PERCENT COMPLETE**. Note – even if Percent complete is 0% - enter a 0. All fields must have a value. After upload, link risks to the tasks, assign resources, and choose start and end dates.

# Additional Task Workflow

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- Tasks can also be viewed and opened from within associated risks.
- If a risk has tasks associated to it, you can see them when you review the risk from the risk section within a remediation project.
- They appear as a list in the center of the risk and are selectable and the task will open when clicked.

# Demonstrate

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- Create Task from Action Bar (all fields, associate risk, resources)
- Create Task from Risk (all fields, resources)
- Add comments to task
- Show Task within Risk Section
- Review task filter