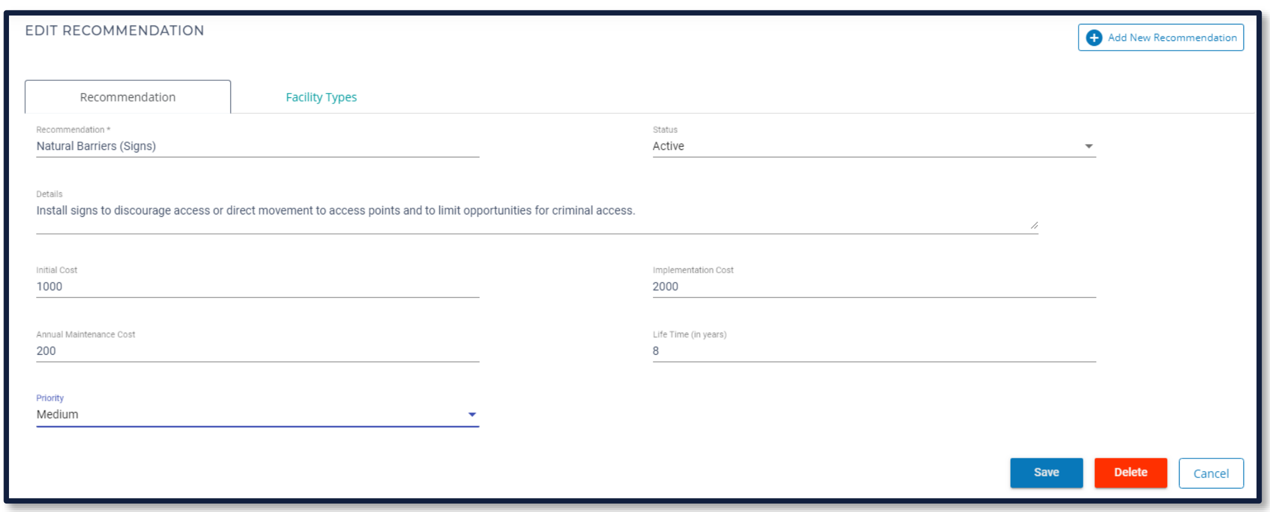
Use Tasks and Recommendations to manage mitigation efforts. Also, map Recommendations to survey questions to provide remedial suggestions for responses that are not compliant. Additionally, you can automatically assign Tasks based on those Recommendations for all Gaps found through the Assessment survey.

Recommendations

Recommendations are the actions you prescribe to remedy shortcomings in security or compliance. These can be created before, during, or after an Assessment has been completed.



Creating a Recommendation before the Assessment

You may want to do this to **automate the mitigation process**. You can create a Recommendation by expanding the *Content Manager* found in the top menu bar and selecting *Risk*

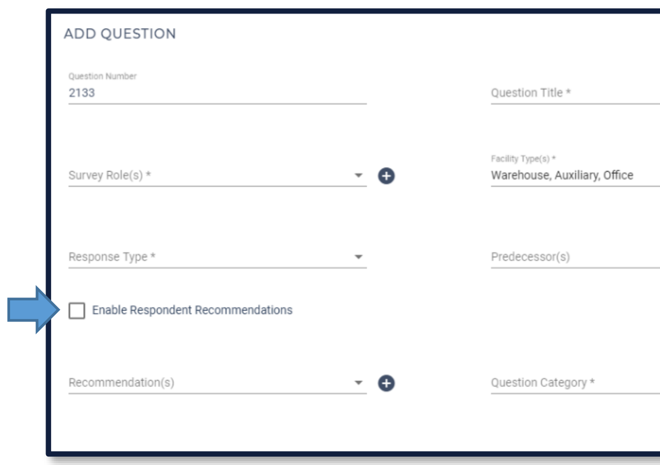
Registers>Recommendations. Alternatively, click on the *Settings* menu item and select *Recommendations* from the left-side menu.

Once you have entered all the details in the main *Recommendation* tab of your new Recommendation, you can switch to the *Types* tab to map it to particular asset types (it will be mapped to all of them by default). Deselect any asset types that this Recommendation would not be applicable.
Next, you can map the Recommendation to a particular survey question by going to that question in the register (expand the top menu item *Content Manager* and select *Question Register,* then click on the appropriate question). Select the Recommendation from the *Recommendation(s)* drop-down menu. You may select more than one Recommendation.

With this Recommendation mapped to a question, it will be provided in final reports when the question is answered with a non-compliant response. Additionally, when the administrator analyzes the gaps in an Assessment, the Recommendation will be available in the *New Task* creation screen when assigning a task to mitigate non-compliant responses to that question.

Creating a Recommendation during the Assessment

If you have selected *Enable Respondent Recommendations* in the Question register for any of your questions, survey respondents will be allowed to give mitigation recommendations for that question. The Recommendation that they give will then be mapped to this question going forward. It will appear in the Report as a suggested remedial action and will be available to be associated with any Tasks related to this question.



Creating a Recommendation after the Assessment

When viewing the Gaps in the *Survey Analysis* screen, click *View Recommendations*. The Recommendations screen for that question will open. If you have already created any Recommendations for this question, they will be visible here. If you have not created any, you may add one by clicking *Add Recommendation*. This new Recommendation will appear in the Report as a suggested remedial action. It will be available to be associated with any tasks you assign related to this security or compliance Gap.

Recommendations in the Report

The *Gap Summary* section of the Report lists all Recommendations for non-compliant questions and the question's details (question text, response, uploads, question weight, tasks).

Multiple Recommendations

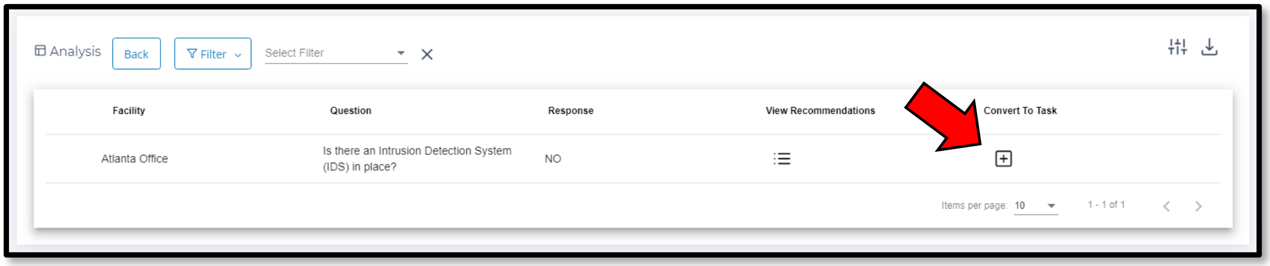
You may have a situation where there are multiple Recommendations for a Gap. For example, a Recommendation is mapped to a question, and the Assessment respondent has provided their own in the Assessment survey. By default, both recommendations will show up in the Report, and both will be available when creating a Task.

Suppose you only want one of the Recommendations to be valid for the Assessment. In that case, you may go to the question in the Survey (using the *Perform Assessment* button) and delete the Recommendation. Any Recommendations deleted at the survey level will not be deleted from the application register.

Tasks

Users create Tasks in two locations in the application.

- **Tasks screen** - Click on the *Tasks* top menu bar item and then click the *Create Task* button found in the *Tasks* screen that opens.
- **Survey Analysis Screen** - Every question listed in the *Survey Analysis* will have a “+” button under the *Convert to Task* column. Click this button to create a Task to be associated with that question.



Task Components

Task Number – A reference number that is unique to every Task

Status – A Task can be either *Open*, *In Progress*, *Assigned, Completed*, or *Closed*.

Assigned By – The user that created the Task. This user will get automated email updates on the completion status of the ask and if it is meeting designated timelines.

Assigned To – The user that is to complete the Task. This user will also get automated email reminders to start or complete the Task if progress is not meeting expected timelines.

Cost – The estimated amount that completing the Task should cost.

Task Priority – *Low, Medium*, or *High*

Created Date – The date the Task was created.

Due Date – The date that the Task must be completed. The application sends automated emails to the task assigner and assignee if progress is not meeting established timelines.

Asset (*facility, scope, vendor, etc.*) – The asset associated with the Task. The Task and its details will appear in the final reports for the selected asset.

Source – The Task's origin.

Assessment – The Task came from an Assessment to mitigate a Gap found through the Survey.

Miscellaneous – The Task is not associated with any Assessment.

Subject – A brief description of the Task.

Description – A detailed explanation of the Task.

Upload – Task creators can upload files that assist the assignee. Task Assignees can upload files to verify task completion or to demonstrate progress.

Observers – Task creators can designate observers to receive updates associated with the Task.

Comments – The Task creator and the Assignee can leave comments regarding the Task. Comments can be viewed by the Task creator, Assignee, and any Observers.

History Tab - Log of all actions related to the Task.