

EPRM Templates User Guide

EPRM v3.63, March 2022

EPRM User Support: eprmhelp@alionscience.com 1.800.754.4204

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Introduction:

Templates are a feature of EPRM that provides time savings for Assessors and provide for standardization across assessments. They are created by Template Managers in order to create a set of pre-loaded answers or values that can be inherited when an Assessor creates a new assessment. Any, or all sections of the assessment may be populated using templates. Normally, a template will be built with multiple organizations, having common characteristics, in mind. The template is a way to provide a common answer, baseline for multiple organizational assessments. Unlike assessments, not all questions must be addressed, and a template can be used for a single focus, like threat characterization.

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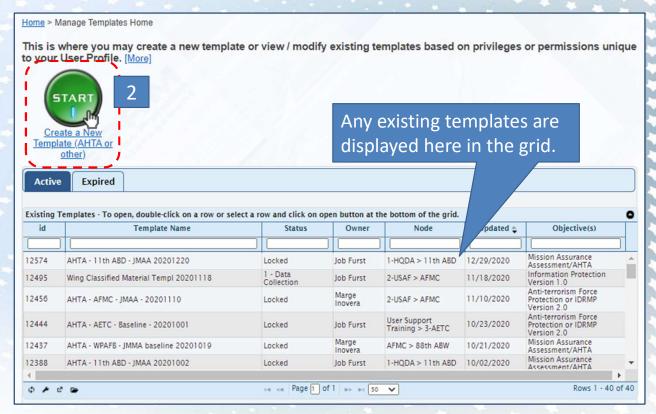
Creating a New Template:

1. To create a template, on the home page dashboard, click the **Manage Templates** icon. Only user profiles that have the **Templator** or **Template Manager** role will be able to see this icon.



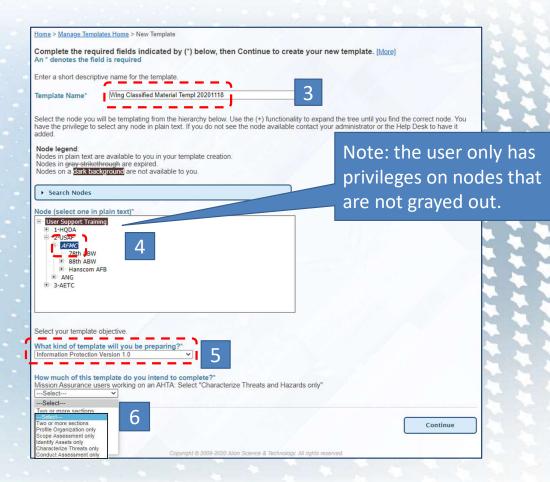
Creating a New Template (cont'd):

Templates that have already been created or are in the process of being created will display in the grid. To create a new template, click the Start button.



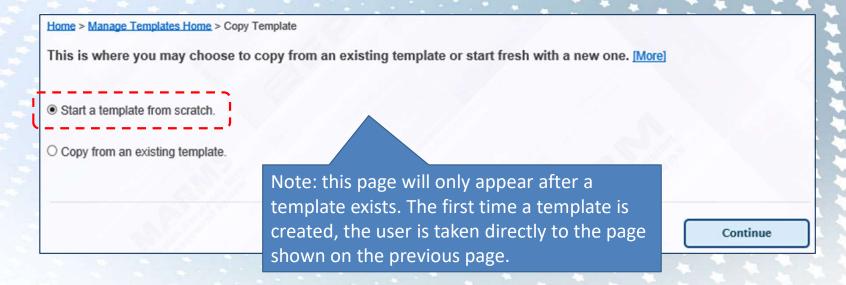
Creating a New Template (cont'd):

- 3. Enter a name in the **Template**Name text box.
- 4. Select the **Node** in which your template is to be created (NOTE: the template must reside at or above all nodes in which it is to be used).
- 5. Select the template **Objective(s)** that you would like to use to create your template.
- Select an option to pare down the template sections for completion.



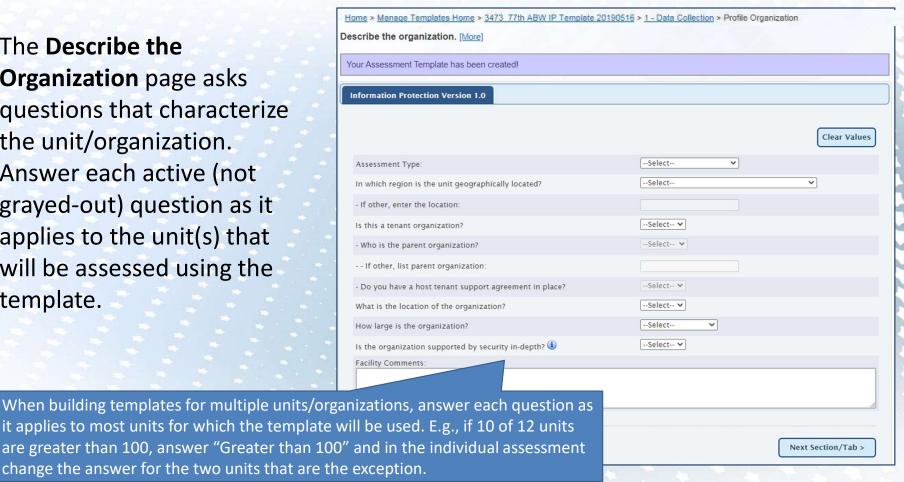
Creating a New Template (cont'd):

7. After the first template is built, when you create a new template, you will be given the option to Copy From An Existing Template that uses the same dataset. For this guide, we will show how to Start a Template From Scratch. Select Start a Template From Scratch and then select Continue.



Creating a New Template (cont'd):

The Describe the **Organization** page asks questions that characterize the unit/organization. Answer each active (not grayed-out) question as it applies to the unit(s) that will be assessed using the template.

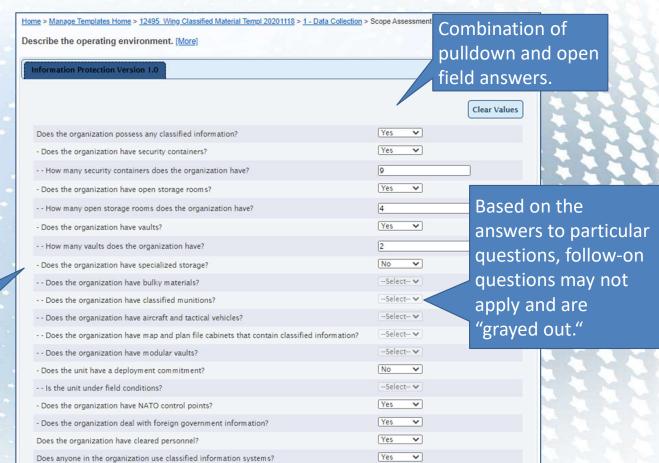


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Creating a New Template (cont'd):

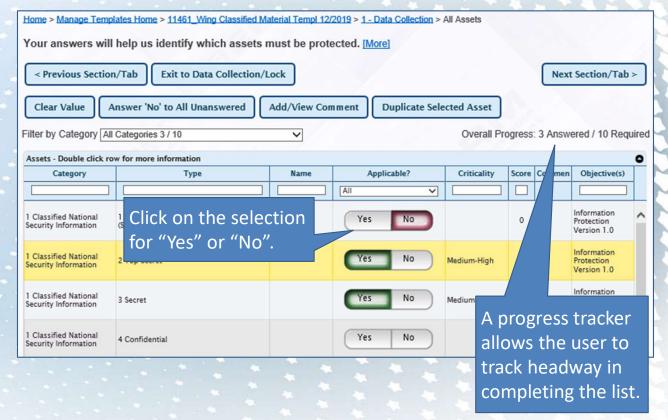
9. The Operating
Environment page asks
additional questions in
order to determine what
type of assessment will
be conducted and to
refine the content of the
assessment.

For templates the user can select which questions to answers, if any, for each page; not all must be answered, unlike for an assessment.

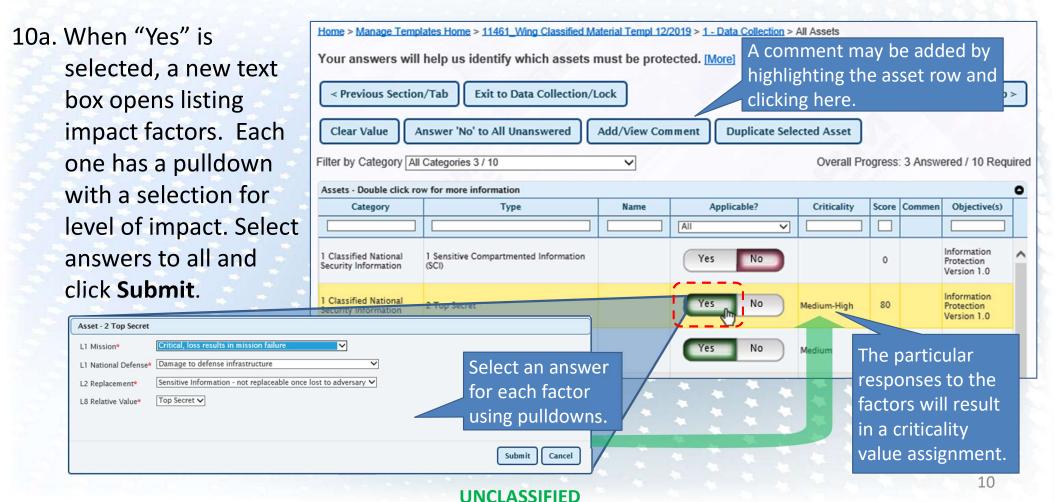


Creating a New Template (cont'd):

10. The **Critical Assets** page asks yes/no questions on whether a particular *Asset* exists within the organization being assessed; for a template it should be answered yes if the majority of users who will apply the template have that particular asset.

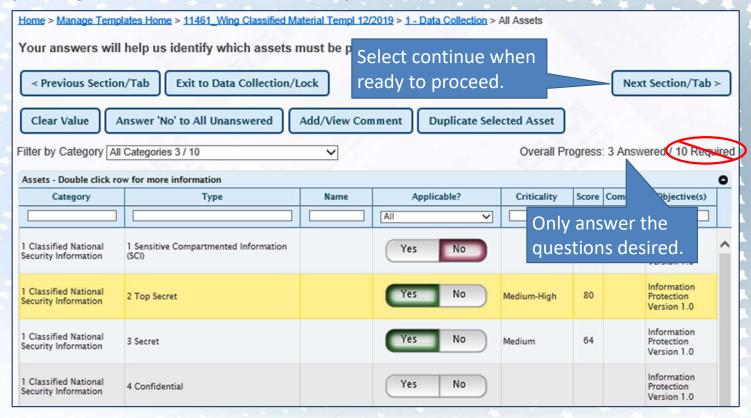


Creating a New Template (cont'd):



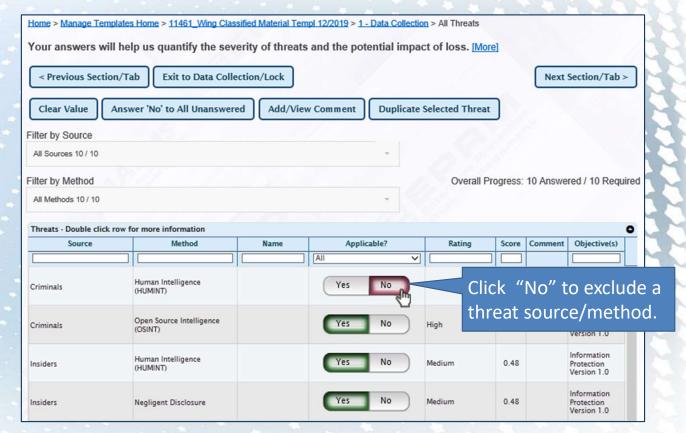
Creating a New Template (cont'd):

10b. When all desired asset lines have been annotated, click "Continue". Unlike completing an Assessment, not all questions must be answered to continue.



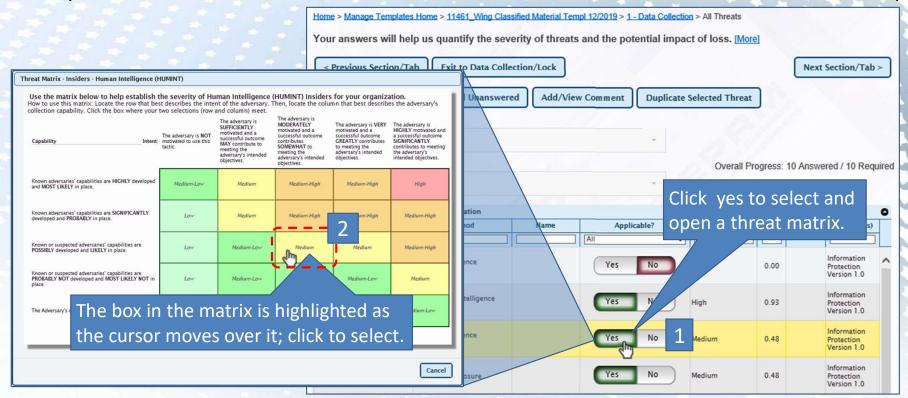
Creating a New Template (cont'd):

11. The All Threats page asks yes/no questions on whether a particular Threat exists within the organization being assessed; for a template it should be answered yes if the majority of users who will apply the template are susceptible to that particular threat.



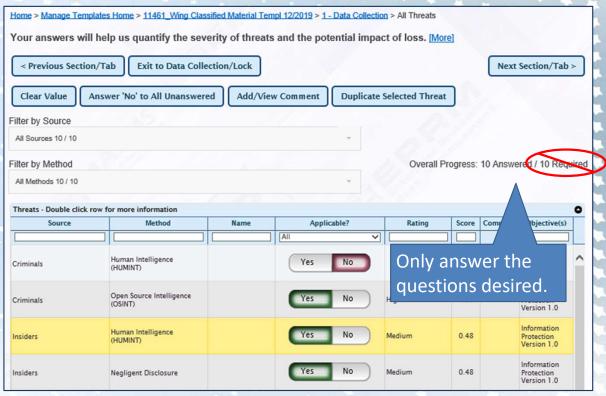
Creating a New Template (cont'd):

11b. When "Yes" is clicked, a threat matrix will open; select the threat level that best corresponds to the most common threat level across the units that will use this template.



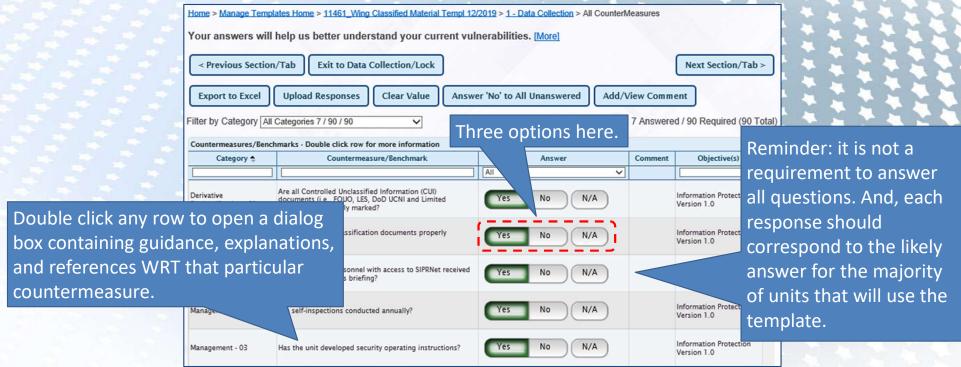
Creating a New Template (cont'd):

11c. Once all desired threat questions have been answered, click continue to move to the next step in the process.



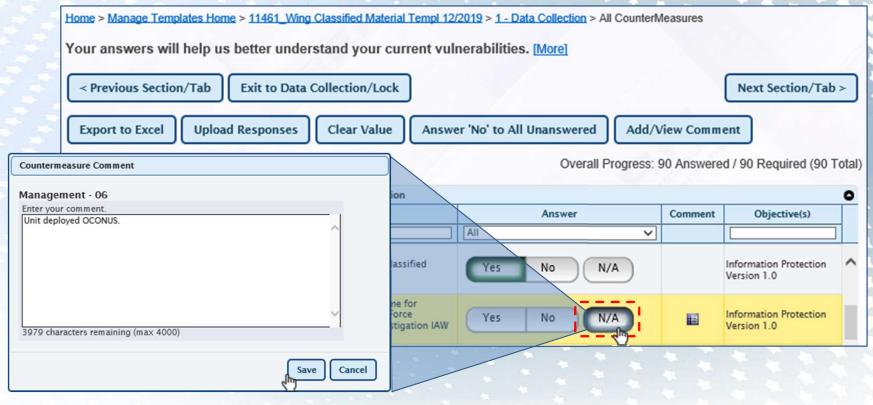
Creating a New Template (cont'd):

12. The **Benchmarks** (countermeasures) page adds an option for answering benchmarks. In addition to **Yes** (benchmark is in place), or **No** (benchmark is not in place), the option for **N/A** (benchmark is Not Applicable) is also available.



Creating a New Template (cont'd):

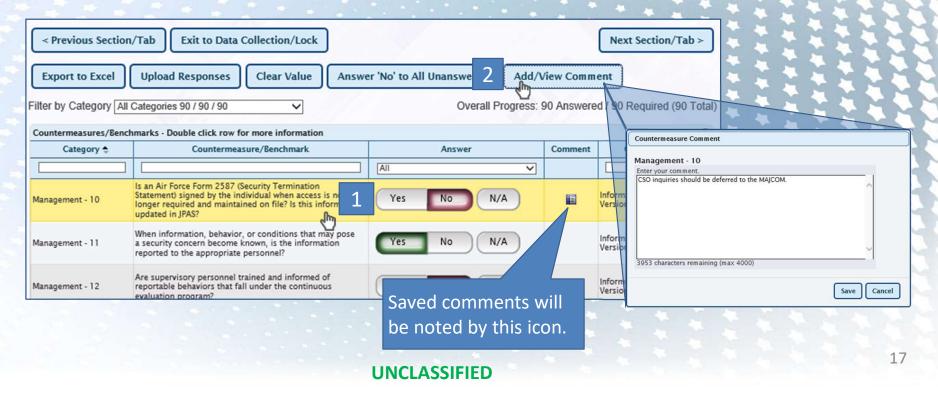
12a. If "N/A" is selected, a text box will automatically open. The user <u>must</u> populate a reason that the benchmark doesn't apply.



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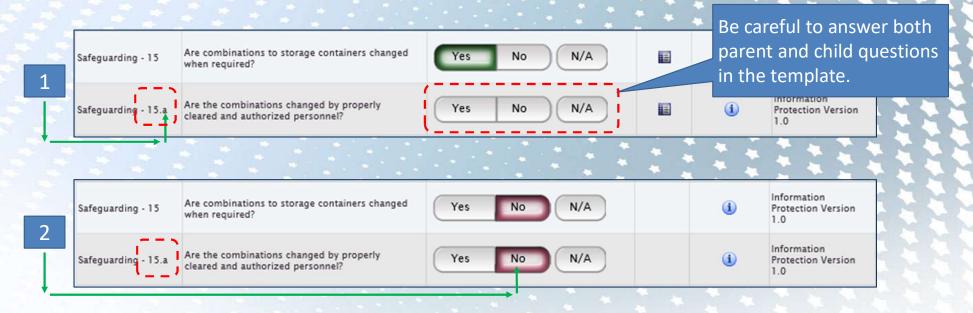
Creating a New Template (cont'd):

12b. Ordinarily, for a template, "No" would not be an answer chosen; the majority of units using the template should be implementing the benchmark. However, if No is selected (1), unlike "N/A", a comment box is NOT automatically opened, but a comment **should** accompany a negative response. Click Add/View Comment (2) to include a comment.



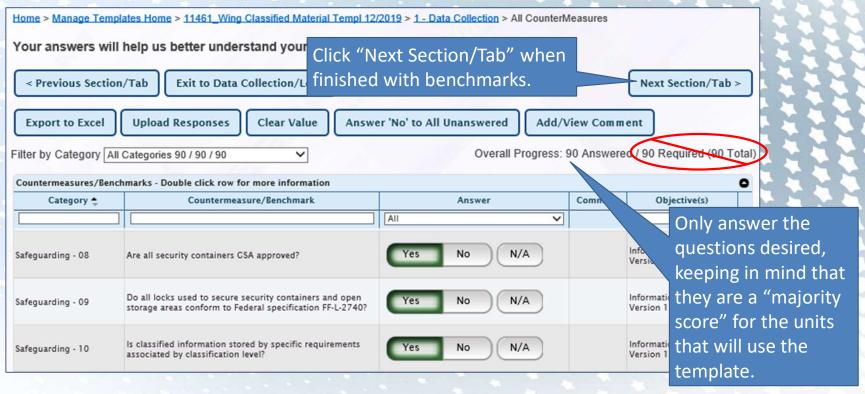
Creating a New Template (cont'd):

12c. Within the benchmarks list there are relational benchmarks referred to as parent/child benchmarks. That is, certain questions are only relevant if others are first affirmed. This can be identified by the type number naming convention (1). If the parent question is answered "No" (2) the child question will also be answered "No" by default.



Creating a New Template (cont'd):

12d. Once all desired benchmark questions have been answered, click continue to move to the final step in the process.



Locking a New Template:

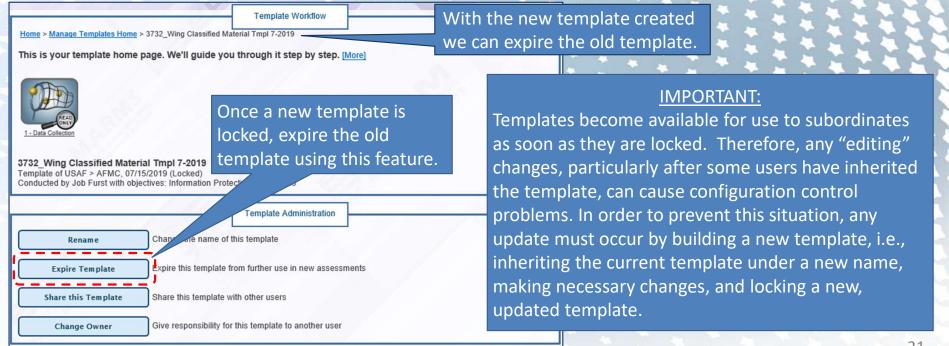
13. After clicking to continue from the benchmarks page, the Template Process Model will appear. If you need to revisit one of the steps, simply click on the icon for that step (1). If the template is complete, click on the "Lock Template" button (2). A confirmation box will open; click "Yes" (3) to confirm and lock the template.



NOTE: Templates cannot be edited after locking. If a template needs to be changed or updated, refer back to step 2 of this guide—create a new template and inherit the template intended for update. Make changes and lock the updated template.

Template Administration:

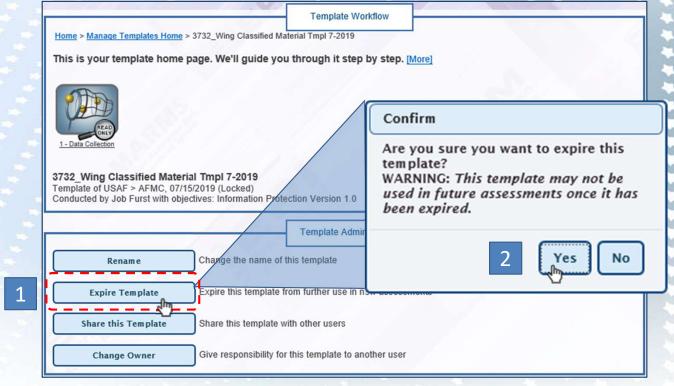
13a. When a template is locked, it can no longer be edited. There are four admin features available. "Rename," "Share," and "Change Owner" are addressed in the Understanding Admin Tools guide. "Expire Template" is unique to the template functionality. It facilitates updating and archiving templates.



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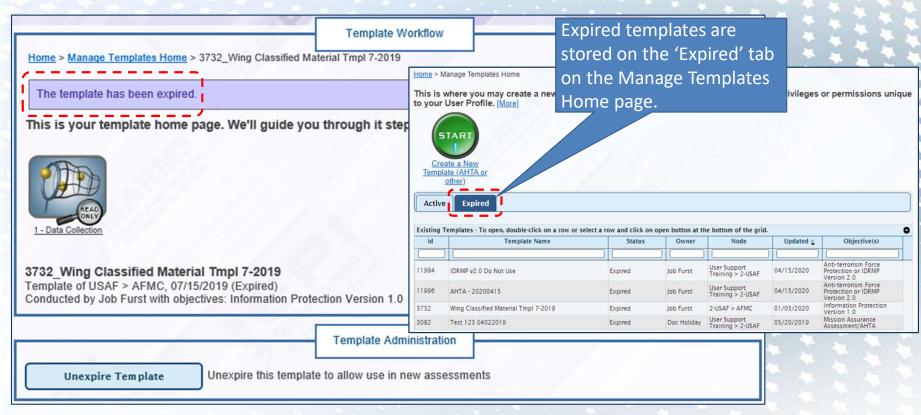
Expire Template:

13b. Click "Expire Template" (1). A confirmation box will open—do not expire a template until it is no longer useful, or a new template is in place. Click "Yes" to complete the expiration process (2).



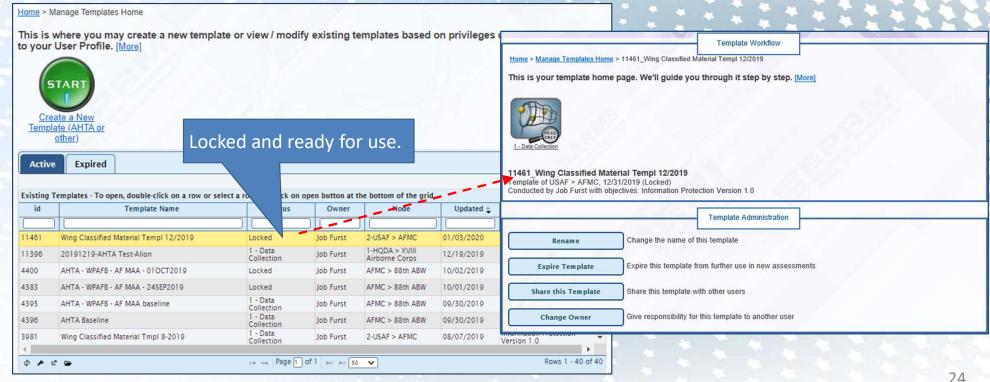
Expire Template (cont'd):

13c. When the expiration action is registered by the program, a notification banner will pop up on the Template Workflow.



Template Administration Conclusion:

The new template is available and ready for use to any users in the user hierarchy. The expired template remains as an historical reference but cannot be used for new assessments. For other useful information please consult the other available users guides.



Final Note: User Assistance

For additional user assistance, please utilize the following references and POCs:

- Accessing system: (SIPRNET) https://eprm.csd.disa.smil.mil
- Help: For assistance and for any questions, please email <u>EPRMhelp@alionscience.com</u> or call 1-800-754-4204. 0700-1700 Eastern time

• Resources:

On SIPR, check the User Guides and References section.



 On NIPR, User guides, videos & other materials are available on the EPRMHelp page: http://eprmhelp.countermeasures.com