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Getting Started & How to Complete an **EPRM Survey**

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Introduction

The survey function is a core capability of the EPRM tool. It uses a process model to walk an auditor through the steps of completing a survey. The following pages will present the process in a way that will guide a user through completing a survey. The survey objective selected for this guide may not depict the same objective assigned to the audience but the process for completing the survey is generally the same.

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User Home Screen

When the user logs into their account, the home screen will appear like the image below. It includes a header that identifies the user's account, activity buttons, and navigation buttons. For PKI Survey users, the "Manage Survey Responses" button will be their primary workspace.



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Manage Surveys Home Screen

After clicking the Manage Survey Responses button users are brought to the Manage Surveys Home page.

The activity buttons from the Home page now appear at the top of the screen throughout the EPRM tool.

Users can begin a new survey by clicking the green “Start” button or double-click a row in the grid to continue work on an existing survey.

The upcoming surveys section displays future surveys to be conducted at the user’s node in the hierarchy.

The screenshot shows the Manage Surveys Home Screen. At the top, there is a Main Menu with several activity buttons: Manage Assessments, Advanced Analysis, Manage Templates (including AHTAs), Manage Survey Responses, and User Guides and References. Below the menu, a heading says "Home > Manage Surveys Home". A message states: "This is where you may create a new survey or view / modify existing surveys based on privileges or permissions unique to your User Profile. [More]" Below this is a large green "START" button with the text "Start a New Survey". To the right of the button is a table titled "Started and Completed Surveys". The table has columns for id, Survey Name, Due Date, Status, Owner, Node, Created, and Objective(s). It lists several surveys, such as 3275, 3198, 3131, 3092, 3089, and 3088. At the bottom of the table is a "Timeline (in months): 12" slider with a note: "Move slider left / right to change number of months for the Upcoming Surveys". Below the slider is a section titled "Upcoming Surveys (next 12 months)" with a table showing Start Survey, Due Date, Last Completed, Frequency (months), and Assessment Focus Statement. The frequency is listed as 6 months, and the assessment focus is AFMC > 88th ABW.

Use the slide selector to change the number of months displayed.

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Creating A New Survey

After clicking the “Start” button on the Manage Surveys Home page, a new window will open; several data fields require input. Those fields denoted by an asterisk (*) must be completed. A more detailed look at the New Survey screen is on the following page.

This screenshot shows the 'Manage Surveys Home' page. At the top, there's a main menu with icons for 'Main Menu', 'Manage Assessments', 'Advanced Analysis', 'Manage Templates (including AHTAs)', 'Manage Survey Responses', and 'User Guides and References'. Below the menu, the URL 'Home > Manage Surveys Home' is displayed. A large green button labeled 'START' is highlighted with a red dashed circle and a blue arrow pointing to it from the text 'Click the green "Start" button.' Below the button, there's a link 'Start a New Survey'. The main content area contains a table titled 'Started and Completed Surveys - To open, double-click on a row or select a row and click on open button at the bottom of the grid.' The table has columns for id, Survey Name, Due Date, Status, Owner, Node, Created, and Objective(s). Two rows are shown: one for survey ID 3278 and another for ID 3279. At the bottom, there are navigation icons and a page number 'Page 1 of 1'.

This screenshot shows the 'New Survey' creation window. At the top, the URL 'Home > Manage Surveys Home > New Survey' is shown. A message says 'Let's get started with the Survey. We'll begin by creating a new survey.' It notes that an asterisk (*) denotes a required field. A text input 'Survey Name*' contains 'AFS - 124th SDN - 20201030'. Below it, a note says 'Select the node you will be assessing from the hierarchy below. Use the (+) functionality to expand the tree until you find the correct node. You have the privilege to select any node in plain text. If you do not see the node available contact your administrator or the Help Desk to have it added.' A 'Node legend:' section defines symbols for plain text, struck-through nodes, and dark background nodes. A search bar 'Search Nodes' is followed by a tree view under 'Node (select one in plain text)*'. The tree shows 'User Support Training' expanded, with '2-USAF' and 'AFMC' collapsed. Under 'AFMC', '78th ABW' and '88th ABW' are collapsed, while '123rd Squadron' is expanded, showing '124th Squadron' selected. Other nodes like '125th Squadron', '126th Squadron', '127th Squadron', '129th FW', and '167th Med Group' are also listed. Below the tree, a note says 'Select your survey objectives.' A checkbox 'Objectives (select at least one)*' is checked for 'Assessment Focus Statement'. At the bottom, there are buttons for 'Due Date' (with a clear button), 'Back', and 'Continue'.

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Creating a New Survey (continued):

1. Name your survey. It is recommended to include a date (YYYYMMDD) in the name for file management purposes.
2. Select unit or organizational node. This allows the survey to be viewed by your organization and is essential for higher level analysis and the control of unit information.
3. Check the survey type ('Objective').
4. Click on Due Date field to bring up a calendar and select a due date, if desired.
5. Click "Continue".

1

Home > Manage Surveys Home > New Survey

Let's get started with the Survey.
We'll begin by creating a new survey.

An * denotes the field is required

Enter a short descriptive name for the survey.

Survey Name* AFS - 124th SDN - 20201030

Select the node you will be assessing from the hierarchy below. Use the (+) functionality to expand the node. You will have the privilege to select any node in plain text. If you do not see the node available contact your administrator.

Node legend:
Nodes in plain text are available to you in your survey creation.
Nodes in gray strikethrough are expired.
Nodes on a **dark background** are not available to you.

2

3

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5

6

Best practice: utilize a conventional naming strategy to standardize survey identification within your organization.

"Search Nodes" feature allows the user to find their unit directly, without manually expanding the hierarchy.

Node (select one in plain text)*

- User Support Training
 - 2-USAF
 - AFMC
 - 78th ABW
 - 88th ABW
 - 123rd Squadron
 - 124th Squadron**
 - 125th Squadron
 - 126th Squadron
 - 127th Squadron
 - 129th FW
 - 167th Med Group

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Conducting a Survey:

The survey objective selected for this guide is comprised of four pages of questions as displayed in the workflow on the left. Clicking on the first step of the survey opens page 1 of the survey. When all required questions are answered click “Continue”. The workflow now displays a green check mark to indicate the section has been completed.

The screenshot shows a survey setup interface with the following elements:

- Page Navigation:** Four circular icons labeled "AFS Page 1" through "AFS Page 4". Each page icon features a stylized "X" symbol and a yellow "CLICK HERE" button.
- Finish and Lock Icon:** A final icon labeled "FINISH AND LOCK" with a lock symbol, which is currently inactive (grayed out).
- Back Button:** A blue arrow pointing upwards labeled "Back to Survey Home Page".
- Note Callout:** A blue callout box containing the text: "Note: The Finish and Lock icon is deactivated (locked) until all survey questions have been answered."

Note: The Finish and Lock icon is deactivated (locked) until all survey questions have been answered.

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Completing the Survey:



When all pages have been completed the Data Collection screen will show the survey is ready to be locked. Click the “Finish and Lock” icon. Returning to the Survey Workflow screen, the Data Collection icon now displays “Read Only” indicating the survey is complete.

The screenshot illustrates the survey workflow process. It starts with the "Data Collection" step, where four pages (AFS Page 1, AFS Page 2, AFS Page 3, AFS Page 4) are shown as completed. A callout indicates that the "FINISH AND LOCK" button is now activated (unlocked). An arrow points to the "Survey Workflow" screen, which shows the survey is now "Locked" and "Read Only". A callout on the right indicates that administrative functions begin on the next page. The "Survey Administration" section at the bottom provides options for editing, renaming, sharing, and changing ownership.

Home > Manage Surveys Home > 3280_AFS - 124th SDN - 20201030 > 1 - Data Collection

This will set-up your 1 - Data Collection.
Use the links below to guide you through the steps.

AFS Page 1 AFS Page 2 AFS Page 3 AFS Page 4

FINISH AND LOCK CLICK HERE

All pages complete

Back to Survey Home Page

This icon is now activated (unlocked).

Survey Workflow

Home > Manage Surveys Home > 3280_AFS - 124th SDN - 20201030

This is your survey process. We'll guide you through it step by step.
Use the links below to guide you through the steps to understand your security posture and your next steps to reduce your vulnerability and risk.

1 - Data Collection

3280_AFS - 124th SDN - 20201030
Survey of 124th Squadron, 10/30/2020 (Locked)
Conducted by Rusty Steele with objectives: Assessment Focus Statement

Survey Administration

Open for Editing Unlock this survey for editing

Rename Change the name of this survey

Share this Survey Share this survey with other users

Change Owner Give responsibility for this survey to another user

Discussion of Administrative functions begins on the next page.

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Administrative Tools: Open for Editing

This feature allows users to return to a survey, which had previously been marked as “**Read Only**”, to make edits to the survey.

The diagram illustrates the transition between two states of a survey's administrative interface:

Left Panel (Locked Survey):

- Survey status: **READ ONLY**
- Survey details: 3280_AFS - 124th SDN - 20201030, Survey of 124th Squadron, 10/30/2020 (Locked), Conducted by Rusty Steele with objectives: Assessment Focus Statement
- Survey Administration** menu:
 - Open for Editing** (highlighted with a red dashed box and a blue arrow pointing to it from the left callout)
 - Unlock this survey for editing
 - Rename
 - Share this Survey
 - Change Owner
 - Delete
 - File/Image Upload
 - Export to Excel
 - Upload Responses
 - Reports
 - View POCs

Right Panel (Unlocked Survey):

- Survey status: **CLICK HERE**
- Survey details: 3280_AFS - 124th SDN - 20201030, Survey of 124th Squadron, 10/30/2020 (1 – Data Collection), Conducted by Rusty Steele with objectives: Assessment Focus Statement
- Survey Administration** menu:
 - Rename
 - Share this Survey
 - Change Owner
 - Delete** (highlighted with a blue dashed box and a blue arrow pointing to it from the right callout)
 - File/Image Upload
 - Export to Excel
 - Upload Responses
 - Reports
 - Manage POCs** (highlighted with a blue dashed box and a blue arrow pointing to it from the right callout)
- Callout:** Survey status indicates Data Collection has been reopened.
- Callout:** Before locking, and when opened for editing, “Manage POCs” appears. When locked, “View POCs” appears. POCs can only be added, edited, and deleted when the survey is open.

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Administrative Tools: Manage POCs

This feature allows users to add points of contact to the survey file. Initially, only the owner of the survey can be found in the POC list. However, users may wish to add a relevant POC, e.g, program manager, unit security manager, et al.

The screenshot shows the 'Manage Surveys Home' interface for survey ID 3280_AFS - 124th SDN - 20201030. On the left, there's a sidebar with various buttons like 'Rename', 'Share this Survey', 'Change Owner', 'Delete', etc. A red dashed box highlights the 'Manage POCs' button. The main area displays the survey details and a table of 'Additional POCs'. One row shows 'Steele, Rusty' with email 'rs@1.com' and phone '703.575.1687'. A green arrow points from the 'Manage POCs' button to this table. A blue callout box says: 'Name of assessor, any added POCs will display here also.' To the right, a larger window titled 'Additional POC' shows the 'Add New Entry' button highlighted with a red box and a green square. A blue callout box says: 'Click "Add New Entry" to enter other POC data for this survey.' Below it, another window titled 'Add/Edit Organization POC' shows fields for 'Full Name*', 'Title/Job Function', 'Phone*', 'Cell Phone', 'Email*', 'Organization Name', 'Address', 'City', 'State', 'ZIP/Postal Code', and 'Country'. A blue callout box says: 'To add an individual, required fields are name, phone, and email. It is also recommended that the Title/Job Function be included.'

Home > Manage Surveys Home > 3280_AFS - 124th SDN - 20201030 > 1 - Data Collection > Additional POC

Please enter additional points of contact (POCs) for your survey, program, organization, etc. To complete the form below, please use the Add New Entry button to update your survey with additional points of contact. To edit a POC that has been added, double-click on the line for that POC. To delete an entry, highlight the entry by clicking on the line once and then click the Delete Entry button.

Add New Entry Delete Entry

Additional POCs

Name	Title	Email	Phone
Steele, Rusty		rs@1.com	703.575.1687

Home > Manage Surveys Home > 3280_AFS - 124th SDN - 20201030 > 1 - Data Collection > Additional POC > Add/Edit Organization POC

Who is your organization's point of contact (POC)? Please enter their name, their contact information, and the name of the organization you are assessing in the fields below.

Clear form

An * denotes the field is required

Full Name*
Title/Job Function
Phone*
Cell Phone
Email*
Organization Name
Address
City
State
ZIP/Postal Code
Country

(F) (L)

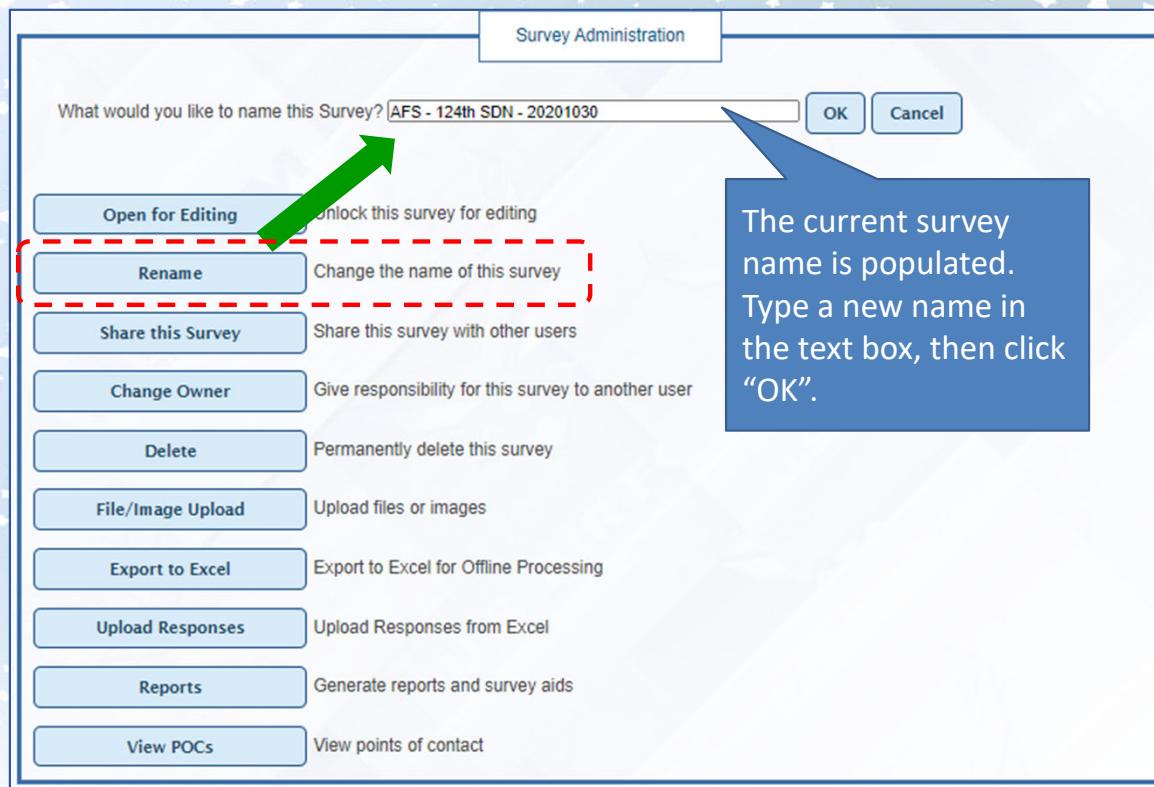
Cancel Save

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Common Administration: Rename

The “Rename” feature allows users to change the name of a survey. Click Rename, enter the new name in the box provided, then click “OK” to save the change.



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Administrative Tools: Share this Survey

Selecting “Share This Survey” allows users to give other EPRM users access to a survey. Allow others to read, edit, and/or conduct analysis depending on the privileges selected.

Pulldown menus allow selection of permissions.

User can designate permission for others to access a survey.

Read Only privileges allow another user to view the survey.
Read/Write privileges allow another user to view and edit the survey.

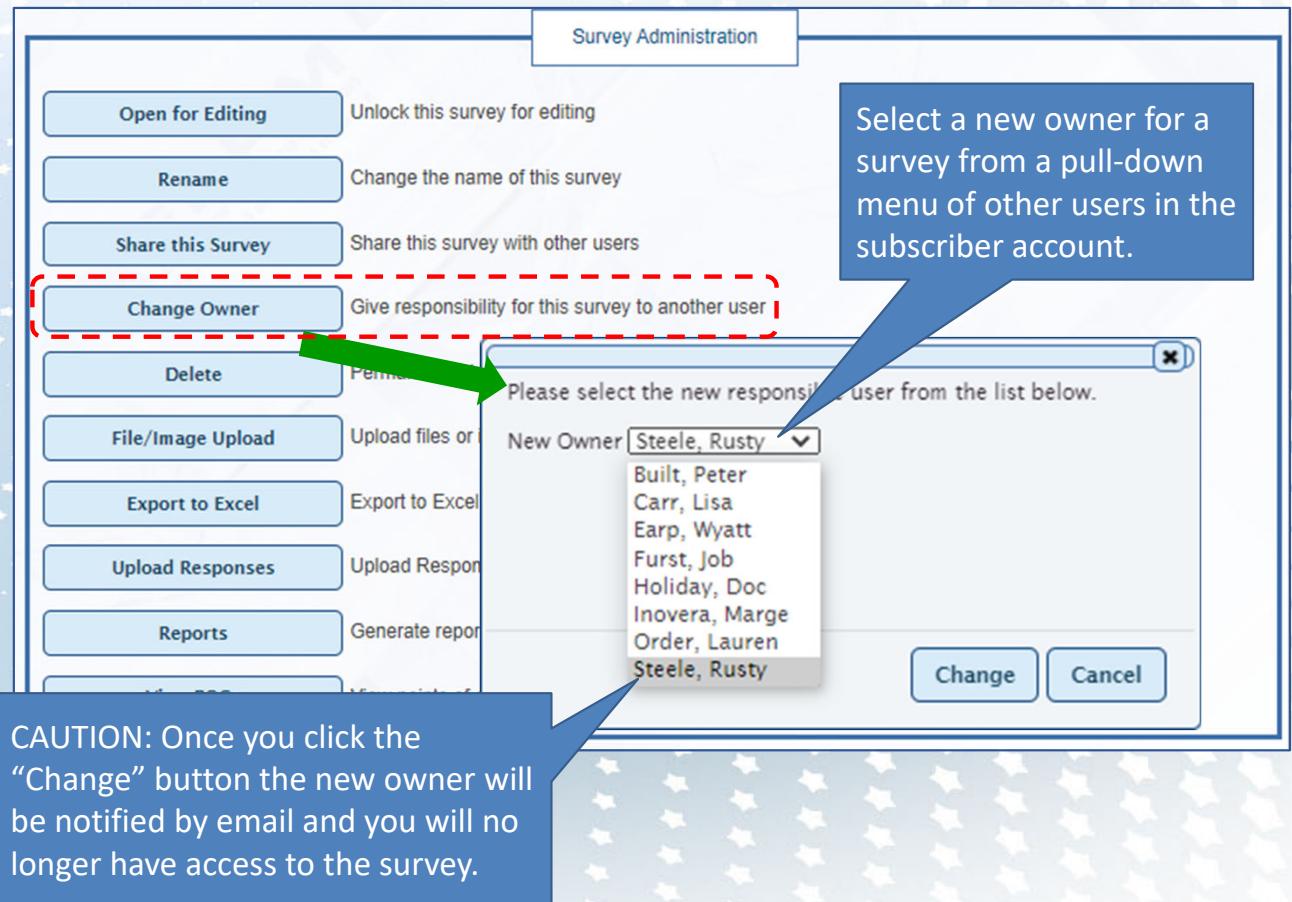
Name	E-Mail	Owner Level	Permissions
Built, Peter		Yes	None
Carr, Lisa		No	None
Earp, Wyatt		Yes	Read Only
Furst, Job		Yes	Read/Write
Holiday, Doc		No	None
Inovera, Marge		Yes	None
Order, Lauren		No	None
Steele, Rusty		Yes	None

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Administrative Tools: Change Owner

The “Change Owner” feature allows the current survey owner the ability to transfer ownership to any EPRM user in that subscriber account. Once changed, the original owner no longer has any access to the survey.

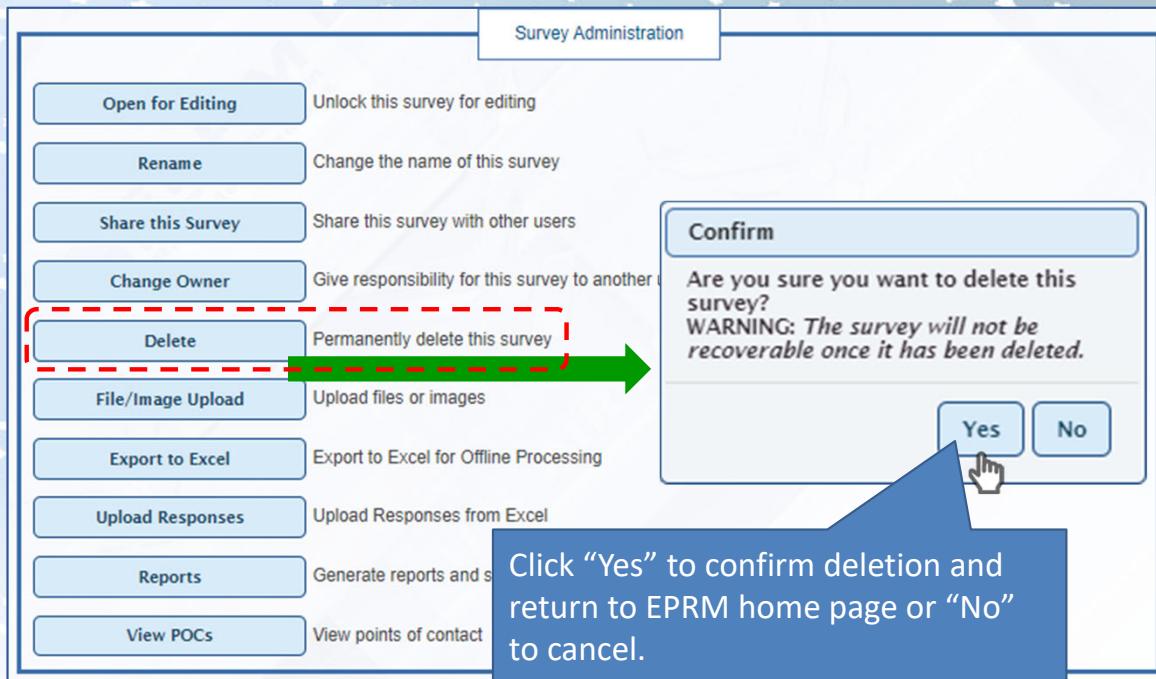


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Administrative Tools: Delete [a Survey]

Selecting the “Delete” feature allows permanent deletion of a survey. Once the survey has been deleted it will not be recoverable. Click “Delete.” A pop-up box will appear to confirm deletion of the survey. Click “Yes,” the survey will be deleted; you will be returned to the EPRM home page. Click “No” to cancel the deletion request.



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Administrative Tools: File/Image Upload

The “File/Image Upload” feature allows users to attach supporting documents and pictures to a survey. Click “File/Image Upload” to open an upload page that allows file upload and attached file management.

The screenshot shows the Survey Administration interface. On the left, a sidebar lists various administrative actions: Open for Editing, Rename, Share this Survey, Change Owner, Delete, **File/Image Upload**, Export to Excel, Upload Responses, Reports, View POCs, and View p. A green arrow points from the "File/Image Upload" button to a callout box labeled "Manage current attachments here." In the center, a modal window titled "File Upload" is displayed. It includes a note about the maximum file size (10MB), a list of allowed file types, and a form for selecting a file with fields for "File" (No file selected...), "Description", and a "Browse" button. A blue arrow points from the "Browse" button to another callout box labeled "Browse for desired file. Once selected, click “Upload” to add/attach file." At the bottom, a grid shows "Current Uploaded Files" with columns for File Name, File Type, File Description, Upload Date, and Uploaded By. A "Delete File" button is located at the top right of this grid. The top right corner of the main interface has "Survey Administration" and "Unlock this survey for editing" buttons.

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Administrative Tools: Export/Import

The “Export to Excel” and “Upload Responses” functions work together to allow the user to complete the survey responses outside of the EPRM tool, in an Excel spreadsheet, and upload the responses back into the tool. Upload progress periodically or when all questions are completed. Subsequent uploads will overwrite existing data in the tool.

The diagram illustrates the process of using administrative tools for survey management. It consists of three main components:

- Survey Administration Panel:** A sidebar on the left containing various administrative actions:
 - Open for Editing
 - Rename
 - Share this Survey
 - Change Owner
 - Delete
 - File/Image Upload
 - Export to Excel** (highlighted with a red dashed box)
 - Upload Responses** (highlighted with a red dashed box)
 - Reports
 - View POCs
- Microsoft Excel Spreadsheet:** An open Excel window titled "Survey Offline Export" showing survey data:

	A	Survey Offline Export
1		
2		
3	Export Generated On	11/02/2020
4	Exported By	Rusty Steele
5	Group Name	124th Squadron
6	Survey ID	3280
7	Survey Name	AFS - 124th SDN - 201030
8		
9		
10		
11		
- Survey Upload Responses Page:** A web page titled "Survey Upload Responses" showing the file selection interface:

Home > Manage Surveys Home > 3280_AFS - 124th SDN - 20201030 > Survey Upload Responses

Survey Upload Responses
Click the "Browse" button to find your file. When ready to upload the file, click the "Upload" button. The upload process may take a while.

Upload File:

A large green arrow points from the "Export to Excel" and "Upload Responses" buttons in the Survey Administration panel to the Microsoft Excel window. Another green arrow points from the "Upload File:" field in the Survey Upload Responses page to the "Upload" button. A blue callout bubble above the Excel window says "Use the tabs at the bottom to complete the survey questions." A blue callout bubble below the Survey Upload Responses page says "Browse for the saved export file and click "Upload".

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Administrative Tools: Reports

The “Reports” feature allows the user to generate various report products as a document or spreadsheet format. The report product type and variety will vary with the selected objective. In the example objective chosen for this guide only Word documents are available, but other objectives may produce reports for Excel.

The screenshot shows two overlapping web pages. The top page is titled "Survey Administration". On the left, there is a vertical list of buttons:

- Open for Editing
- Rename
- Share this Survey
- Change Owner
- Delete
- File/Image Upload
- Export to Excel
- Upload Responses
- Reports** (this button is highlighted with a red dashed border)
- View POCs

The "Reports" button has a green arrow pointing to the second page. The second page is titled "Home > 3280 AFS - 124th SDN - 20201030 > Reports". It contains the following content:

Survey Reports
EPRM can generate a variety of report documents, analysis spreadsheets, and presentations based on this survey.
Pick the report you want to create...

Survey Reports (Word)	Survey Reports (Spreadsheet)
AFS Survey Report AFS Survey	

At the bottom of the second page are "Back" and "Continue" buttons.

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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 EPRMhelp@hiit-sd.com 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>



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