EPRM
Enterprise Protection Risk Management

Getting Started & How to Complete an EPRM Survey

EPRM v3.64, March 2024

EPRM User Support: eprmhelp@hii-tsd.com
1.800.754.4204

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.

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.

This header indicates the account.

Main menu activity buttons; the number will vary based on the user's role(s).

Navigation buttons allow users to jump to specific pages or functions. (e.g. Home, Manage Profile, Change Password, Log Out). Number of buttons will vary based on user permissions.

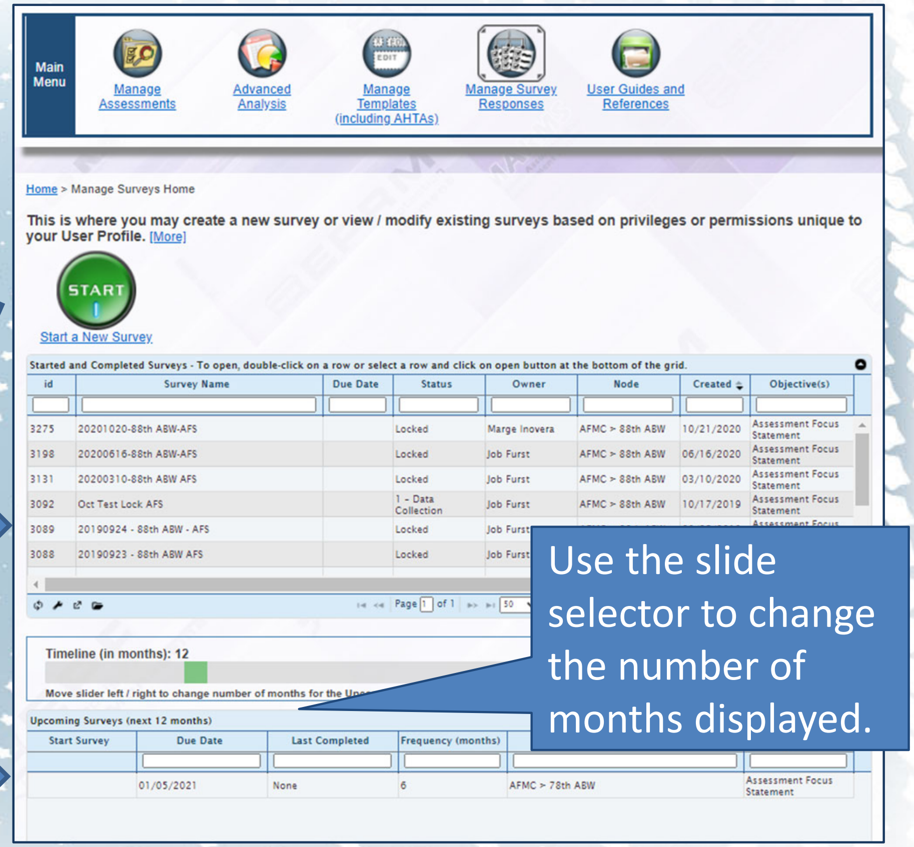
Manage Surveys Home Screen

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.

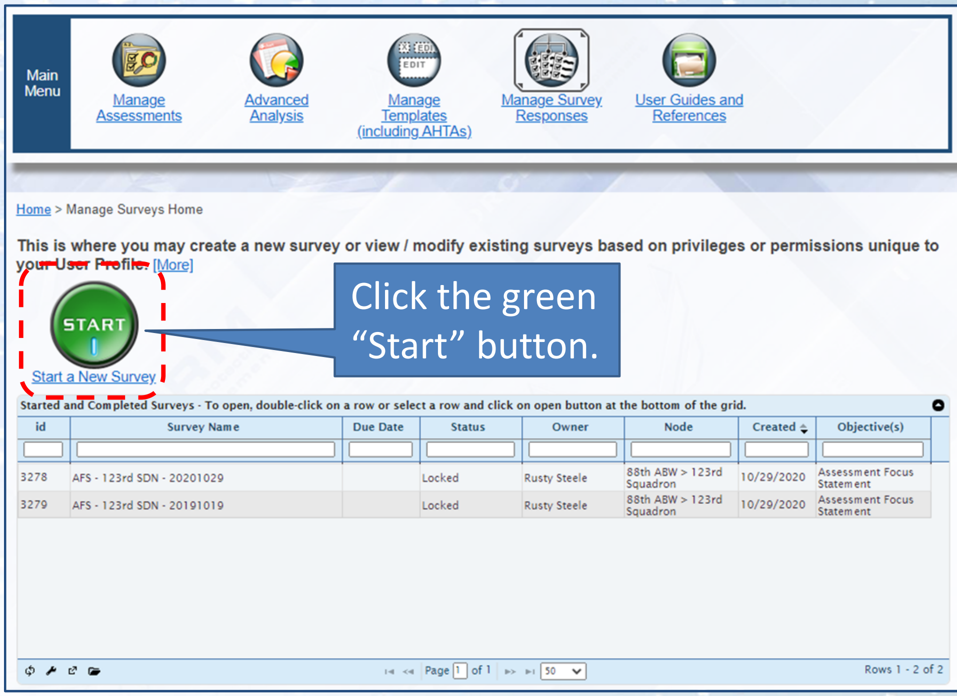
Users can begin a new survey by clicking the green “Start” button or double-click a row in the grid to continue work on an existing survey.

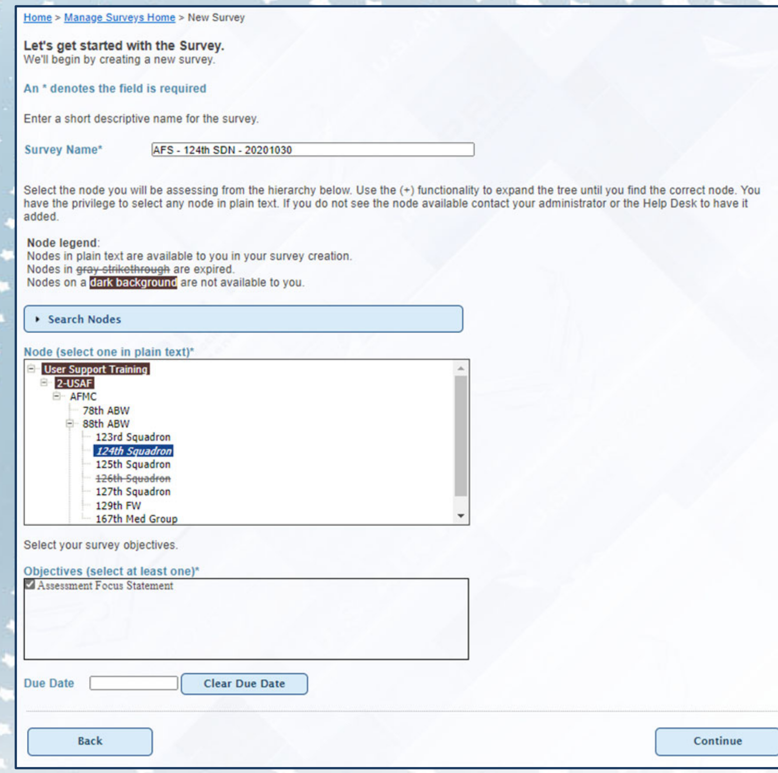
The upcoming surveys section displays future surveys to be conducted at the user’s node in the hierarchy.



Creating A New Survey

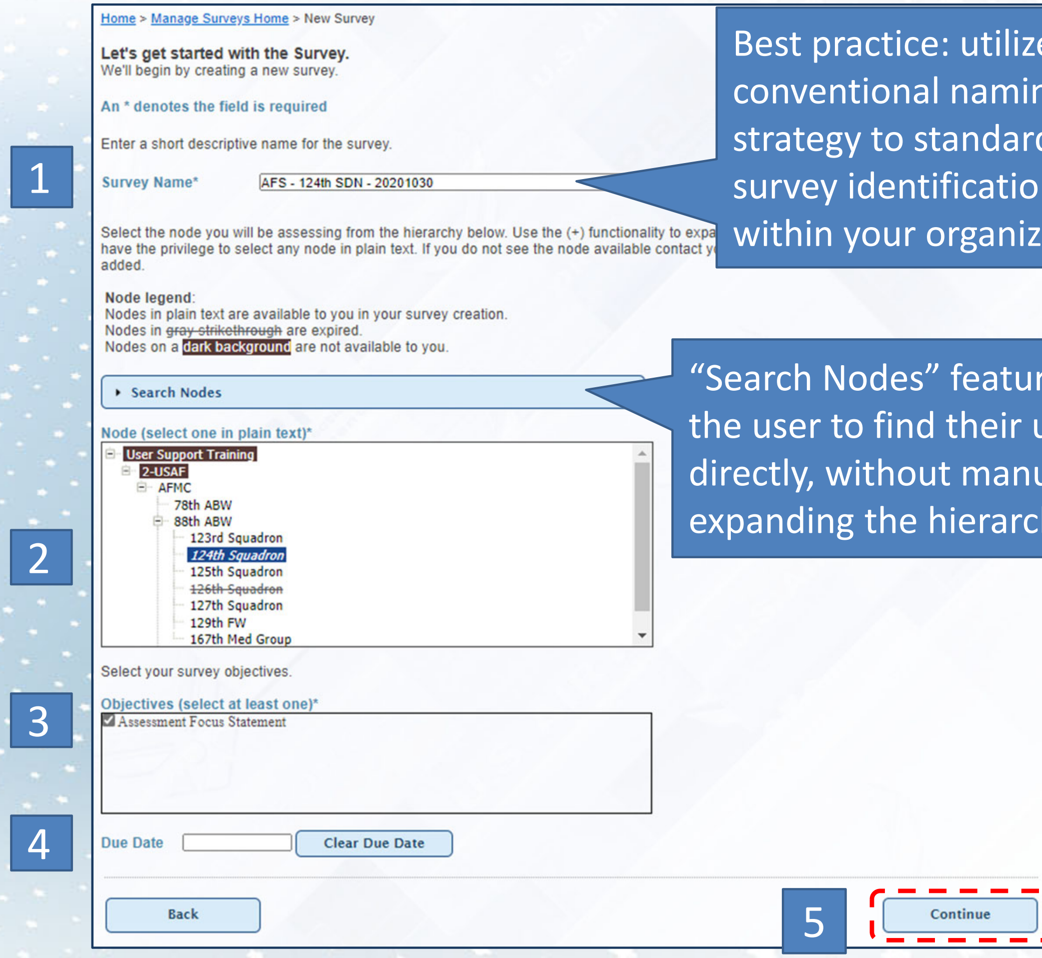
After clicking the “Start” button on the Manage Surveys Home page, a new window will open; several data fields require input. Those fields denoted by an asterisk (*) must be completed. A more detailed look at the New Survey screen is on the following page.





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**".

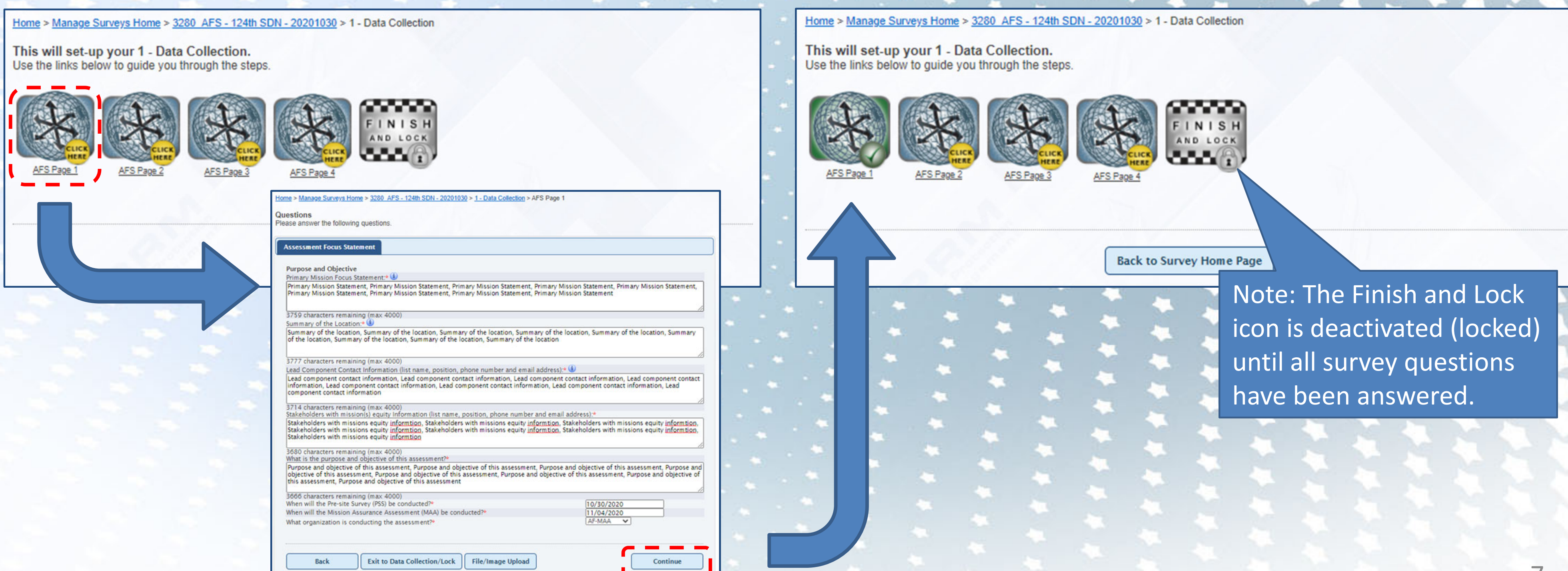


Best practice: utilize a conventional naming strategy to standardize survey identification within your organization.

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

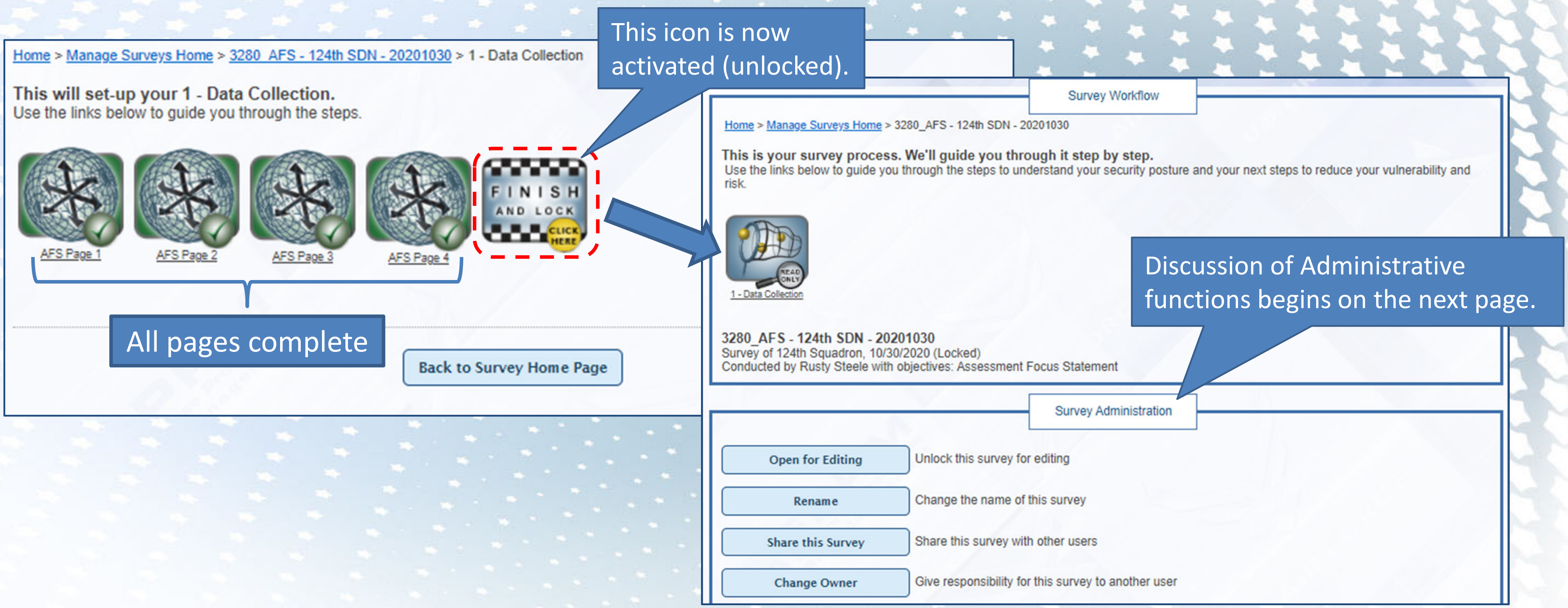
Conducting a Survey:

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.



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.



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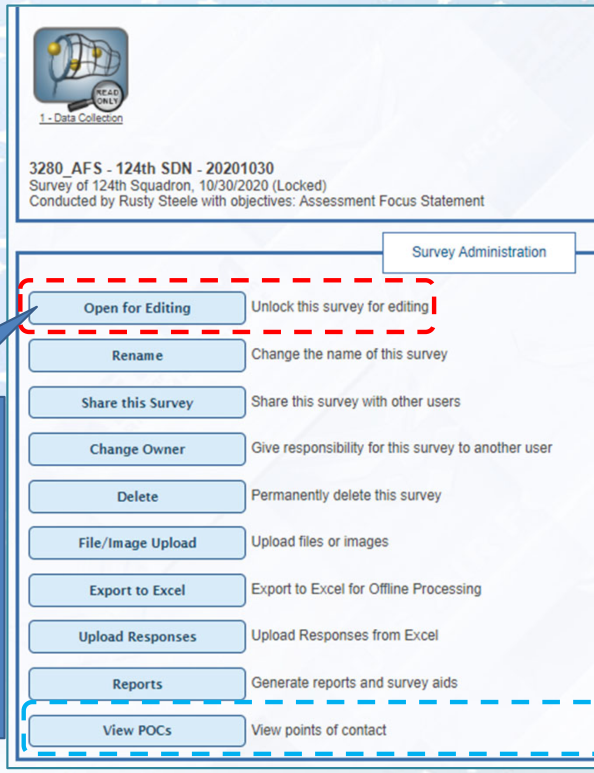
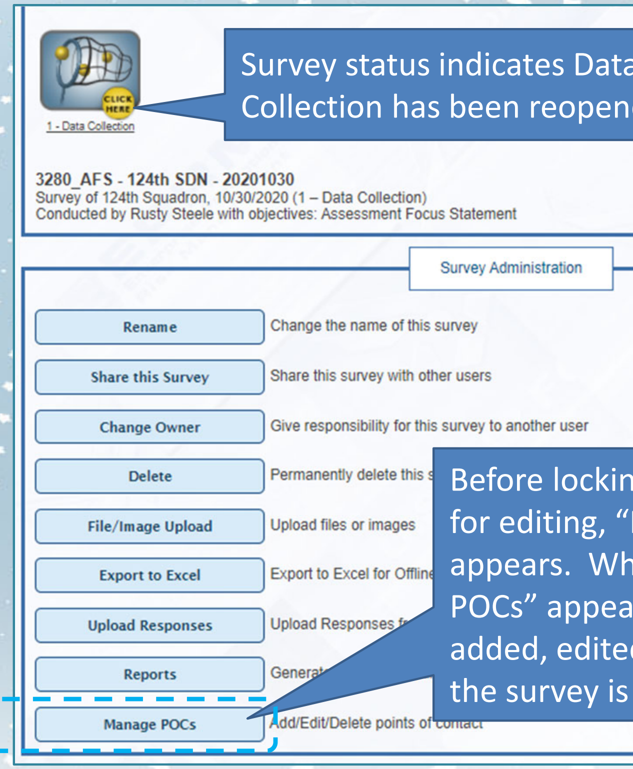
Administrative Tools: Open for Editing

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



Click here, to unlock the survey. Caution should be used in editing so that accurate survey data is not lost in the editing process.



Survey status indicates Data Collection has been reopened.

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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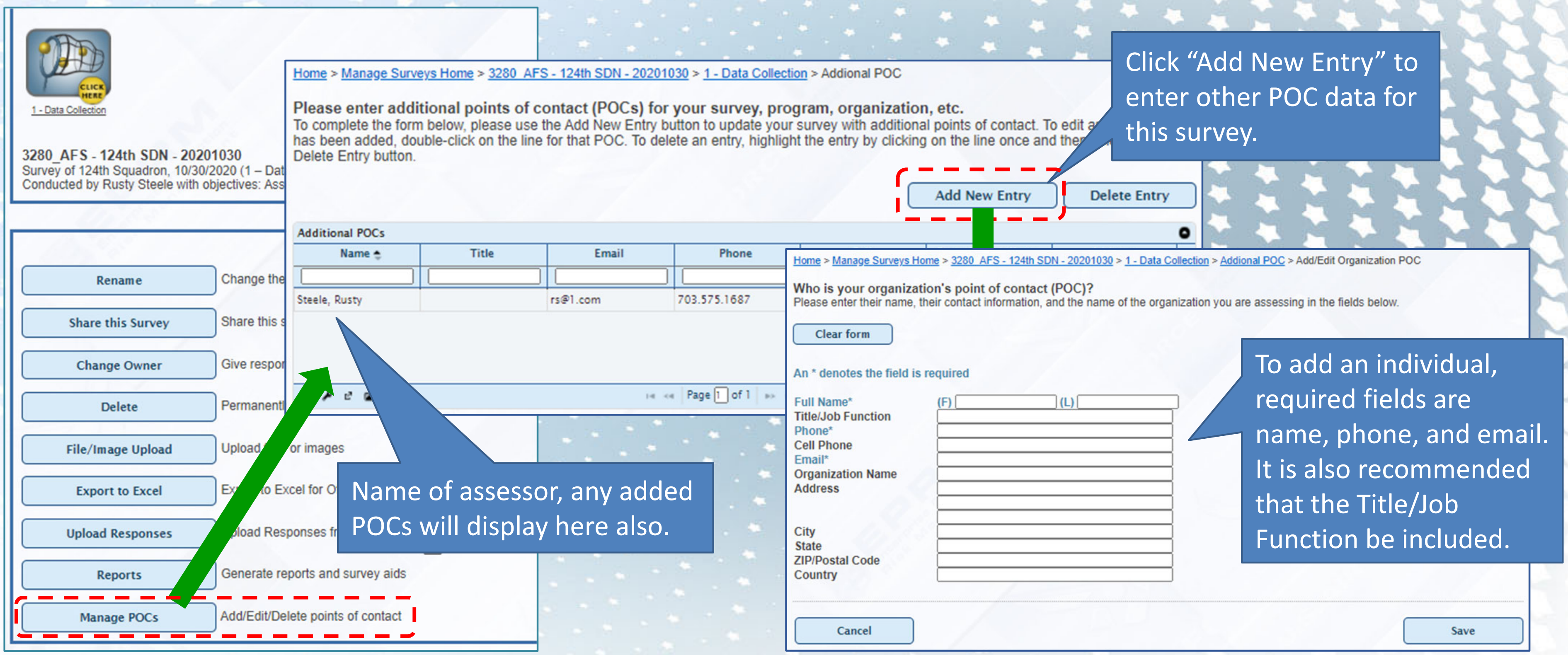
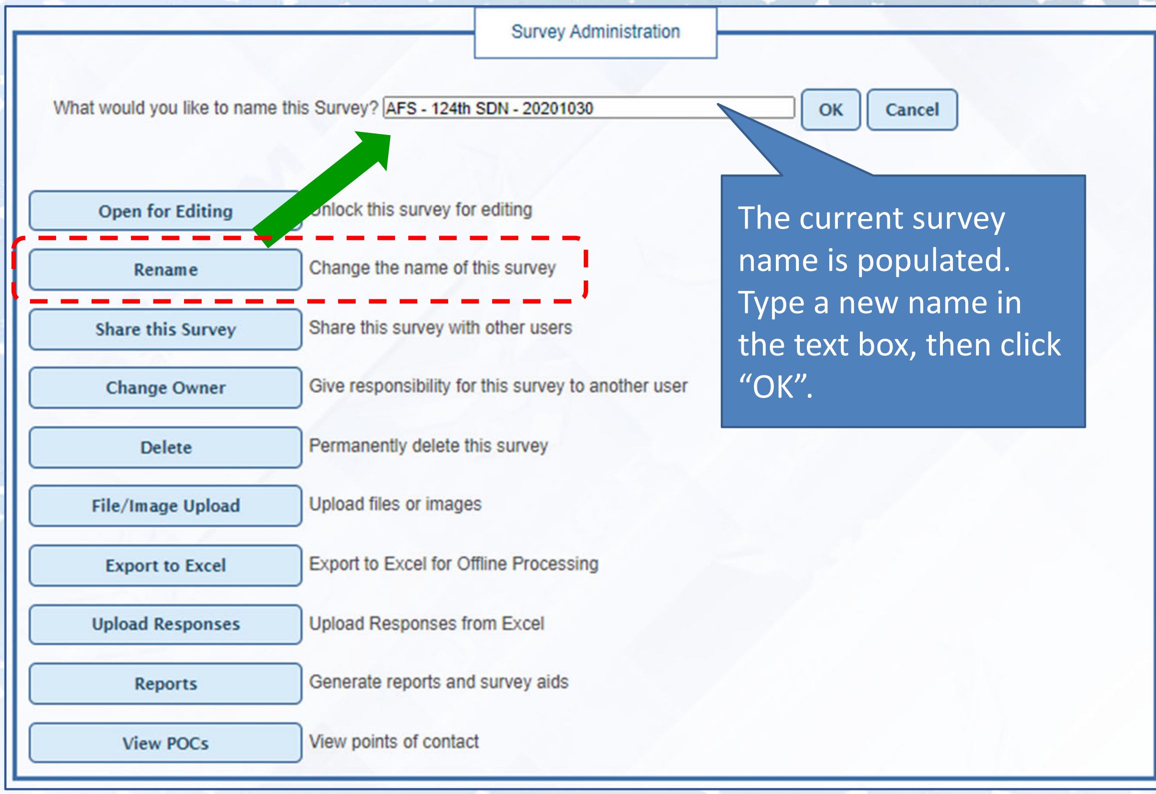
Administrative Tools: Manage POCs

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.



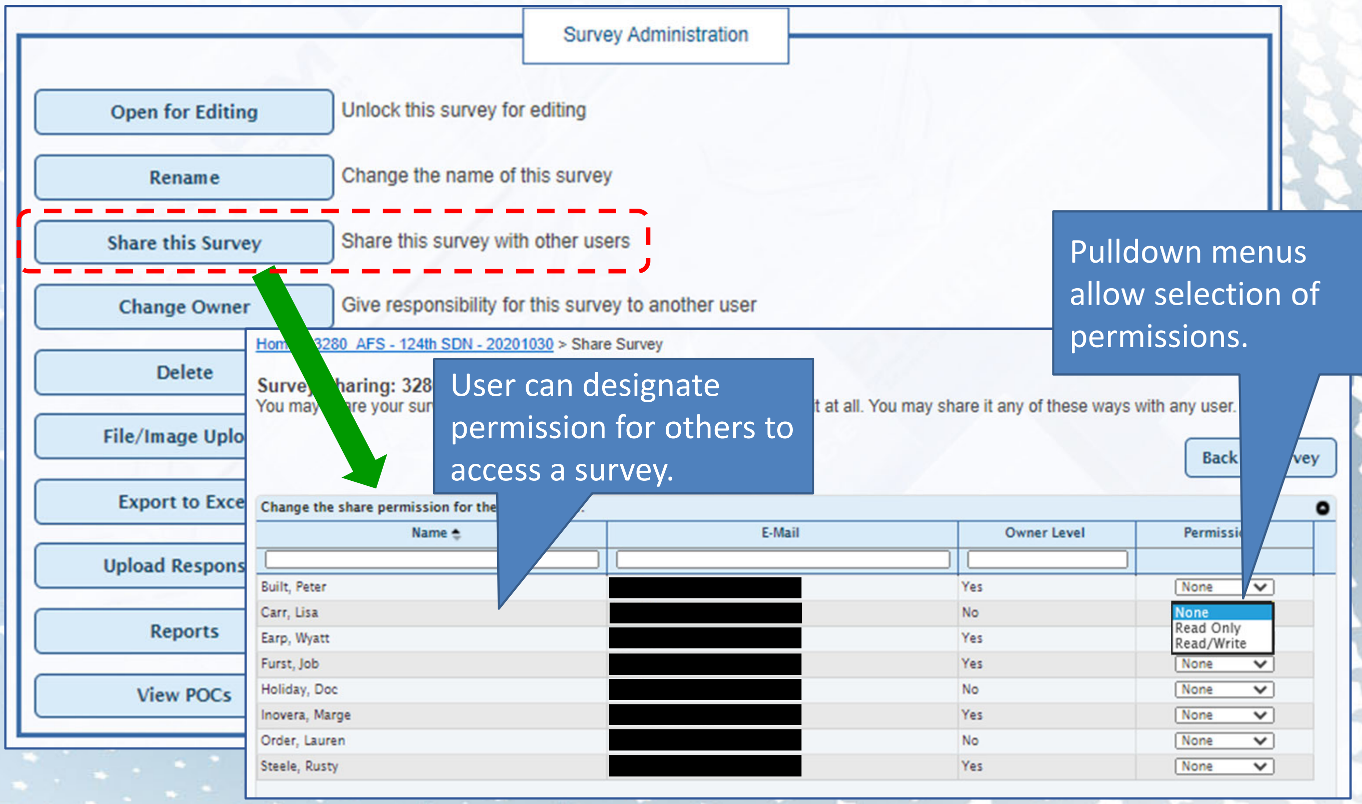
Common Administration: Rename

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.



Administrative Tools: Share this Survey

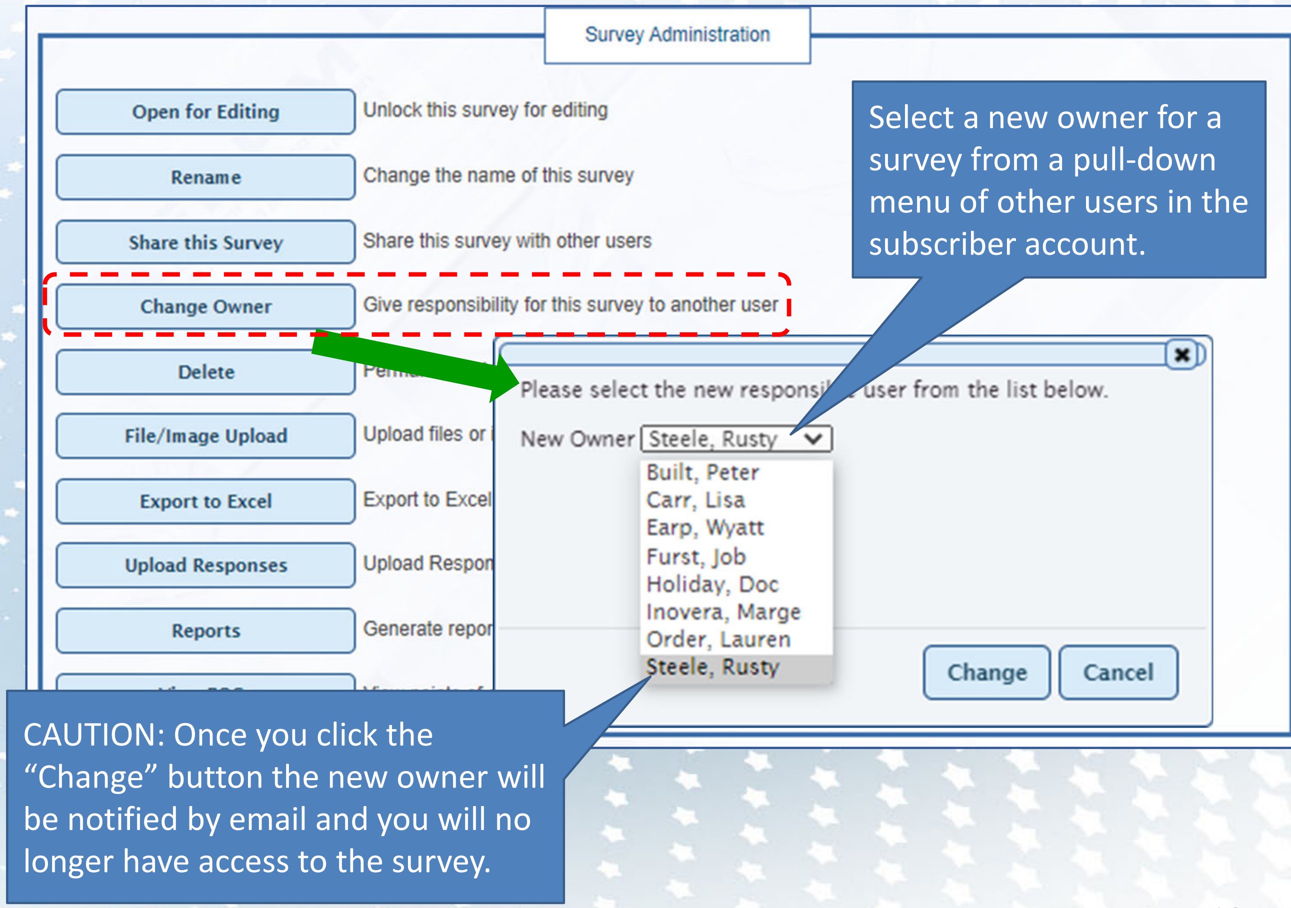
Selecting "Share This Survey" allows users to give other EPRM users access to a survey. Allow others to read, edit, and/or conduct analysis depending on the privileges selected.



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

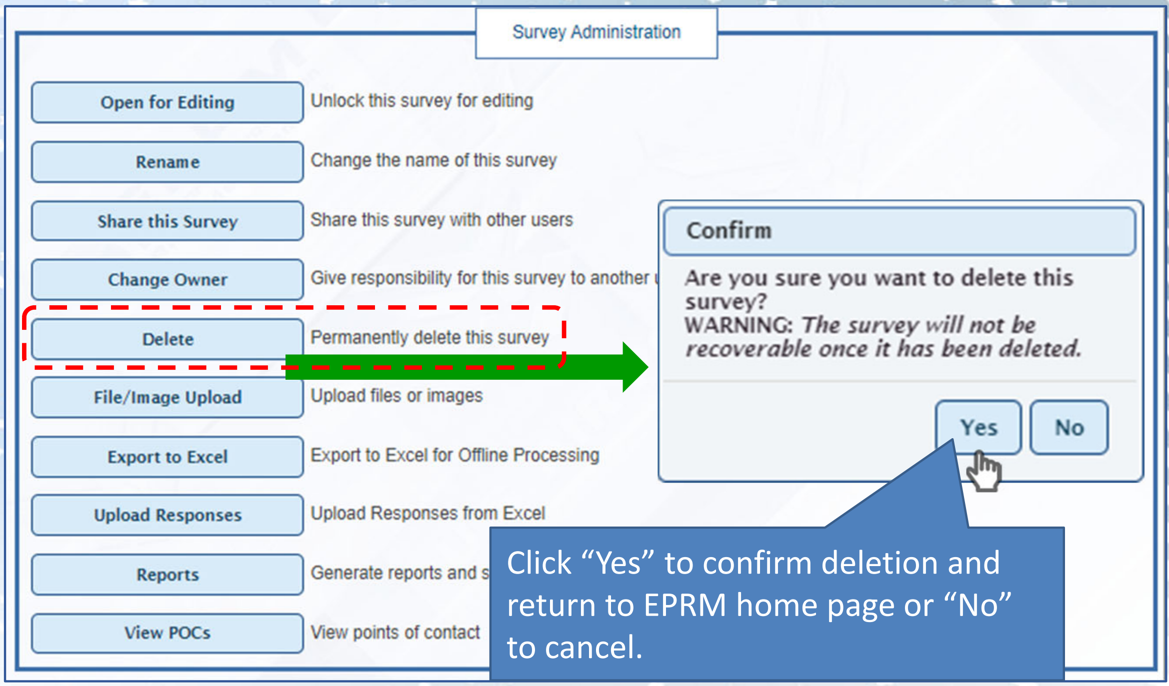
<u>Administrative Tools: Change Owner</u>

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 <u>no longer has any access to the survey</u>.



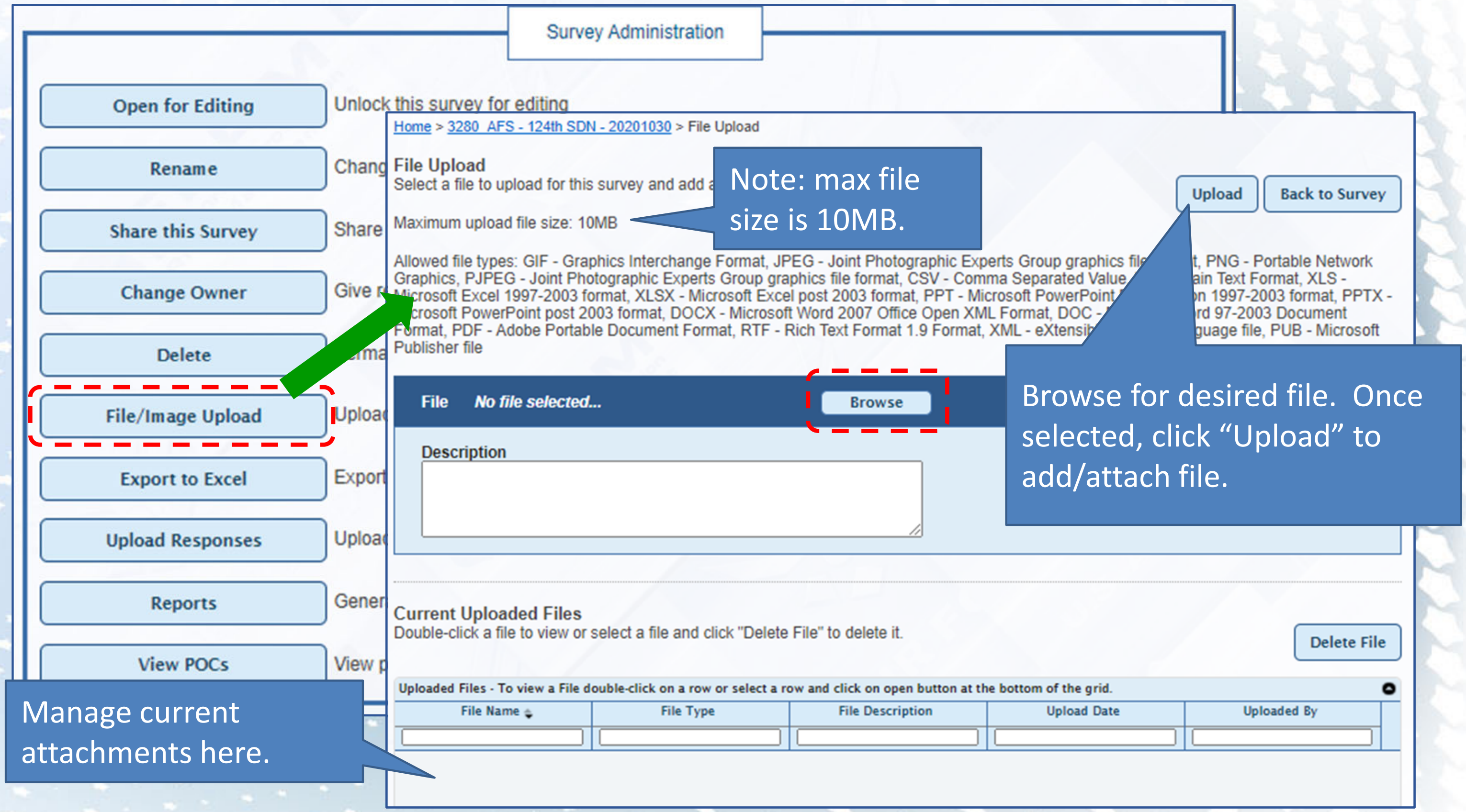
Administrative Tools: Delete [a Survey]

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.



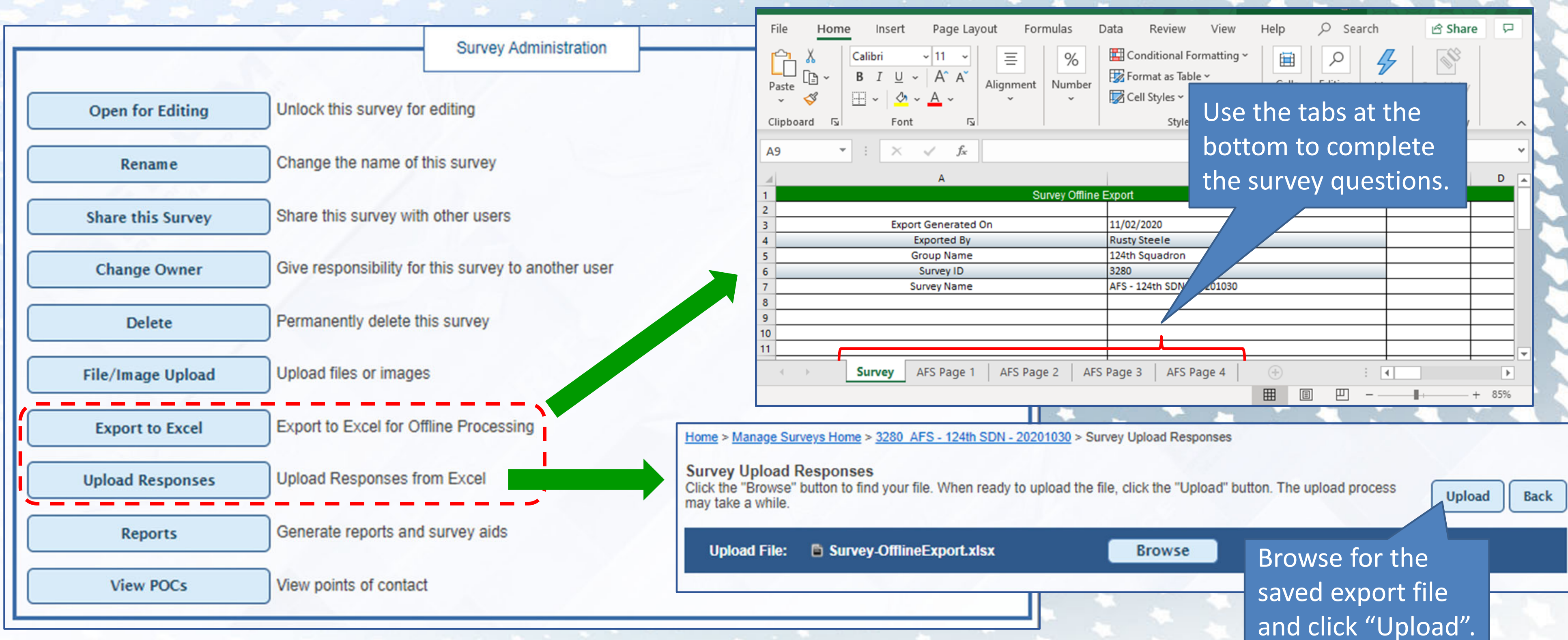
Administrative Tools: File/Image Upload

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.



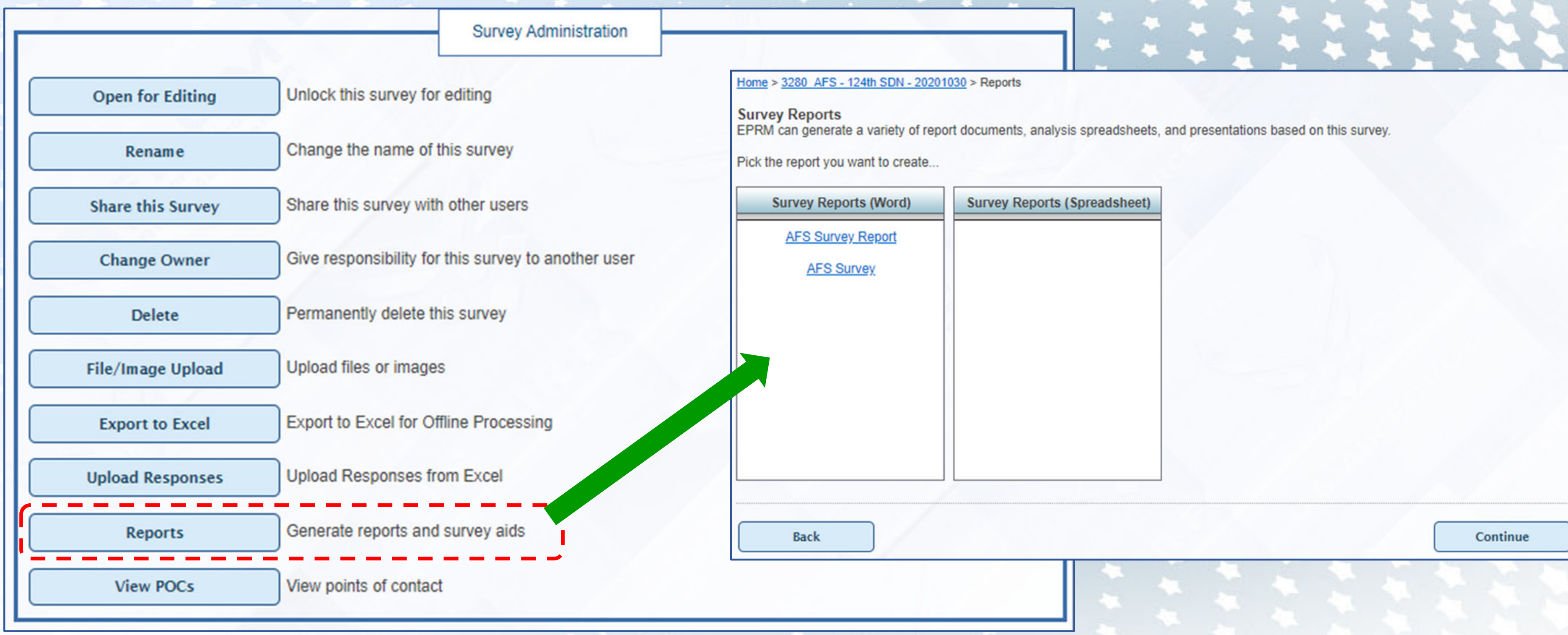
Administrative Tools: Export/Import

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.



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.



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@hii-tsd.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