



Keylight® Platform Fundamentals

Keylight Setup

Objectives

- Apply your branding to the Keylight platform
- Create labels with color schemes for reporting
- Get information about your licensing and email settings
- View event logs and email logs
- Specify file types for attaching documents, images, and other files

Keylight setup

Administrative functions for managing platform elements

The screenshot shows the Lockpath Keylight administrative interface. The top navigation bar includes links for AM, BCM, CM, IM, RM, SM, VM, a user icon with a notification count of 1, a help icon, and a search bar. The left sidebar is titled "Keylight Platform" and contains the following sections and items:

- Assessments
 - Answer Sets
 - Templates
- Email Templates
 - Issue Assessment
 - Assessment Submitted
 - Assessment Output
 - Reopen Assessment
- Question Library
 - Categories
 - Questions
- Branding
 - Login Welcome Message
 - Logo
 - Skin
 - Support

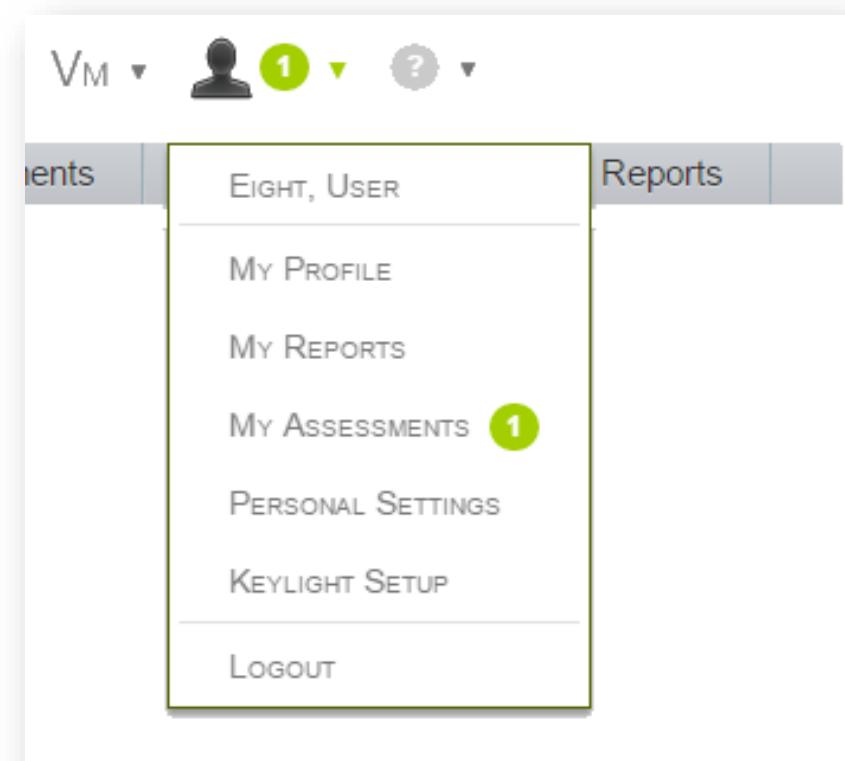
A vertical scrollbar is visible on the right side of the sidebar area. To the right of the sidebar, a user dropdown menu is open, showing the following options:

- EIGHT, USER
- My PROFILE
- My REPORTS
- My ASSESSMENTS 1
- PERSONAL SETTINGS
- KEYLIGHT SETUP** (highlighted in green)
- LOGOUT

*This option is only available if you have administrator permissions

User Profile

- **My Profile** – Change your password and view assigned user groups
- **My Reports** – View your created reports
- **My Assessments** – View assessments assigned to you
- **Personal Settings** – Customize your Dashboard portal
- **Keylight Setup** – Platform Configuration options
- **Logout** – Ends your Keylight session



Branding

Branding setup

Keylight Platform

Assessments

Branding

Login Welcome Message

Logo

Skin

Support



Authorized users only!

If you have forgotten your password, please use the [Forgot Your Password?](#) link below. If you have forgotten your username, hipchat the Support group or email support@lockpath.com for assistance on the LockPath corporate instance.

Thank you

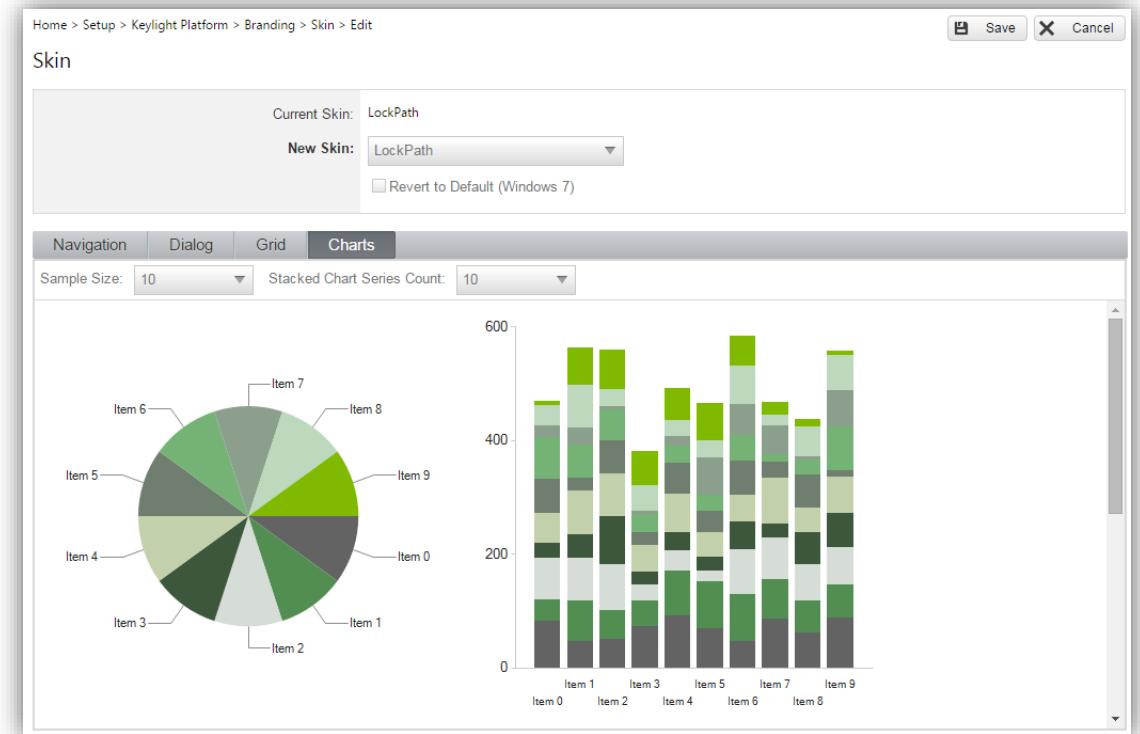
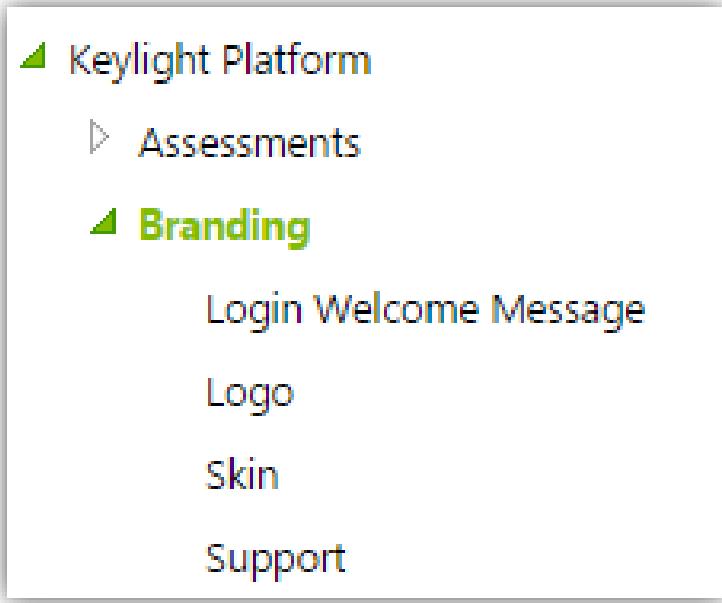
Username:

Password:

[Forgot Your Password?](#)

[Login](#)

Skin



Support



Keylight Platform

Assessments

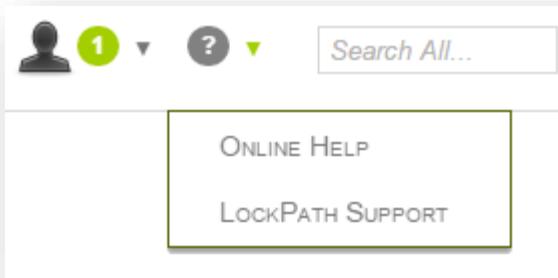
Branding

Login Welcome Message

Logo

Skin

Support



Support

Support Name:	LockPath Support
Support Link:	http://www.lockpath.com/support

Save Cancel

Save Cancel

Reporting setup

Keylight Platform

- ▷ Assessments
- ▷ Branding

Reporting

Default Reporting Colors

Default Reporting Colors

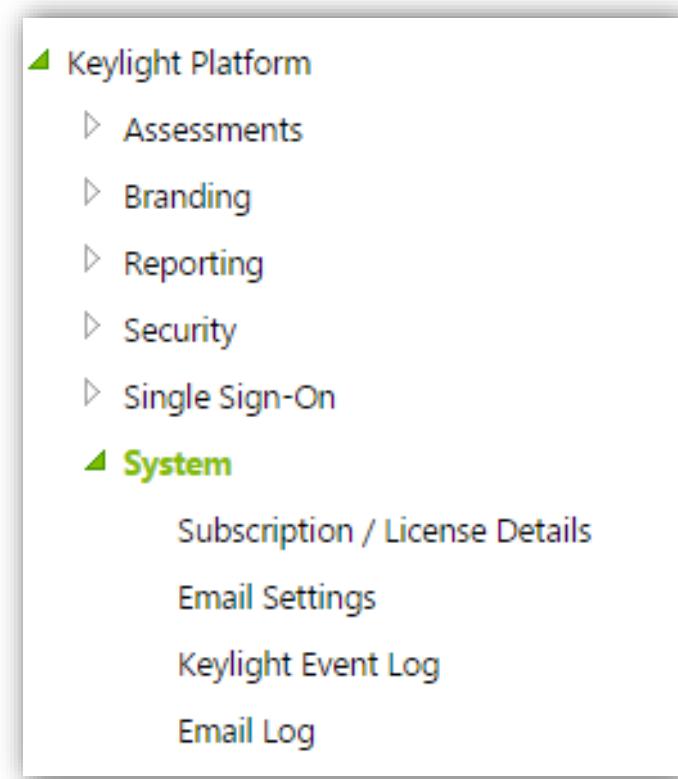
This grid displays the list of all preconfigured chart colors. Click Add... to create a new default chart color. Click the links in the Label column to modify an existing color.

LABEL	CHART FILL COLOR	GRID TEXT COLOR	
Critical		Critical	
High		High	
Medium		Medium	
Low		Low	
Informational		Informational	

System

System menu options

- Subscription/License Details
- Email Settings
- Keylight Event Log
- Email Log



System menu options

Subscription / License Details

Details about the Keylight License

Subscription / License Details

View the details about the Keylight license, such as the products installed, the expiration date, the number of users, and more. [Learn more »](#)

Domain: [training2.keylightgrc.com](#)

Status: Active

Activation date: 6/23/2014 12:00:00 AM

Expiration date: 6/23/2020 12:00:00 AM

Number of Ambassadors: 0

Number of full users: 10 / 41

Number of awareness
users: 2 / 40

Number of vendor contacts: 10 / 40

Products: [Keylight Am](#), [Keylight BCm](#), [Keylight Cm](#), [Keylight Im](#), [Keylight Platform](#),
[Keylight Rm](#), [Keylight Sm](#), [Keylight Vm](#)

Connectors: Acunetix, BeyondTrust Retina, HP WebInspect, IBM Security AppScan Standard, McAfee Vulnerability Manager (Foundstone), NMap, Rapid7 Nexpose, Tenable - Nessus

Data feeds: LDAP Directory Sync, NVD, Reminder

System menu options

Email settings

Configure Keylight notification settings for your email server



Email Settings

Click **Edit** to configure how Keylight connects to your mail server and to customize the address that emails transmitted in Keylight are sent from. You can also configure the text you want to appear in the footer of emails sent via Keylight. [Learn more »](#)

Administrative email:

Email footer:

Notice!

This email was sent from a LockPath **training environment** and was generated for training purposes. If you have received in error, please forward to support@lockpath.com and note the situation in your email.

Thank you!

SMTP configuration source:

[DataFeedService Smtp.config file](#)

[Send Test Email](#)

System menu options

Keylight event log

Displays error and events

Diagnose and fix many configuration issues

Keylight Event Log

This grid displays a list of Keylight error and event logs, including the date and message associated with each error or event. [Learn more »](#)

ID	Date	Level	Logger	Message	Connector
262210	03/10/2014 5:01:28 PM	INFO	trunk-tw.qa	END: Processing Qualys WAS Automatic Detection Data-feed [DataFeedServices]	Qualys WAS
262209	03/10/2014 5:01:28 PM	INFO	trunk-tw.qa	END: Processing Qualys Knowledgebase Data-feed [DataFeedServices]	Qualys

System menu options

Email log

Shows the email generated for workflow, assessment, awareness events, and others.

Email Log					
This grid displays a list of the emails that have been sent using the Keylight application. Emails appearing in the email log include those sent as part of workflow, assessments, awareness events, scan file imports, and emails sent to vendors. Learn more »					
DATE	SUBJECT	BODY	SENT TO	SOURCE	
09/01/2015 7:33:26 PM	Record Review Complete	This record has completed the review process	Admin, LP	Workflow Stage Notifications	
09/01/2015 7:33:26 PM	Record Review Complete	This record has completed the review process	Welch, Jack	Workflow Stage Notifications	
09/01/2015 7:33:26 PM	Record Review Complete	This record has completed the review process	One, User	Workflow Stage Notifications	
09/01/2015 7:33:26 PM	Record Review Complete	This record has completed the review process	Two, User	Workflow Stage Notifications	
09/01/2015 7:33:26 PM	Record Review Complete	This record has completed the review process	Three, User	Workflow Stage Notifications	

General settings

Specify file types for attaching various files, for example documents, images, or others.

General Settings

Attachment security: Allow all file types ▾

Example: pdf, doc, docx, xls, xlsx, png, jpg, nessus, xml

Save Cancel





Keylight® Platform Fundamentals

User Management

Objectives

- Identify the security levels
- Manage users and groups
- Manage user authentication

Keywords

Term	Description
License Types	A classification of the user access determined by a Keylight license. This includes: Full user, Awareness user and Vendor Contacts
Security Configuration	Settings for password requirements and user sessions.

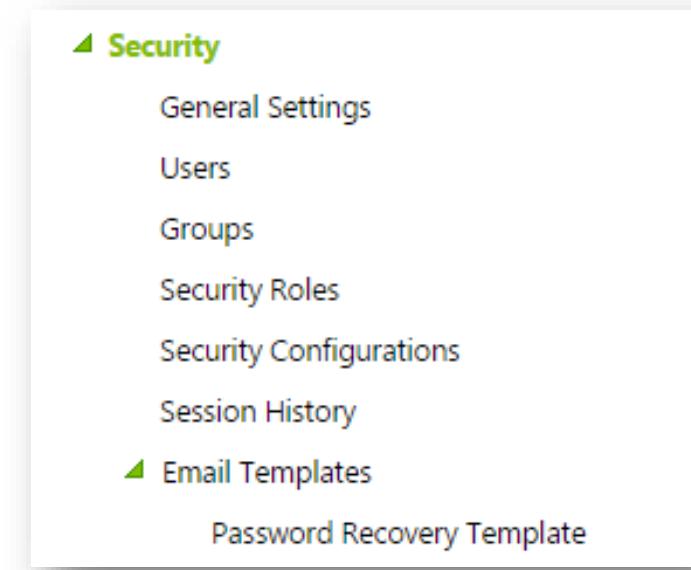
Keywords

Term	Description
Security Role	Container/grouping of permissions that are assigned to a user or group
User	An individual who uses the Keylight platform and applications.
Group	A number of users who share the same privileges.
Security Role Permission Type	<p>The level of access given to a user or group through the Security Role.</p> <ul style="list-style-type: none">• Administrative access• General access

User Security

User security

Manages user permissions to platform components and access to records.



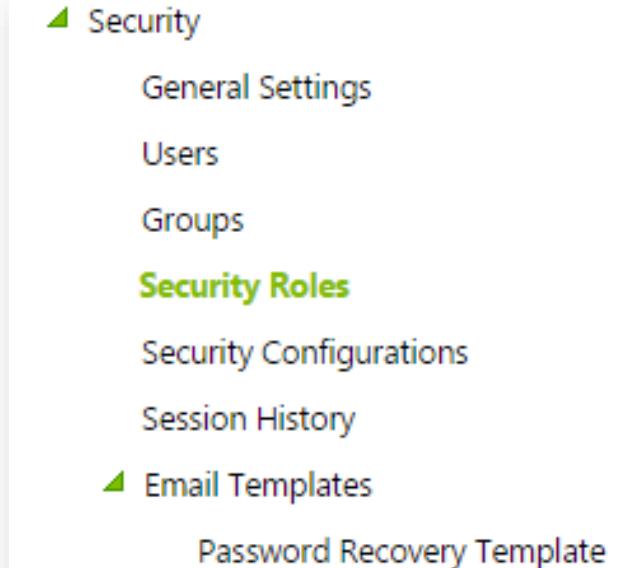
Security Levels

Level	Type	Access Level
1	Security Role	To applications and platform components
2	Workflow Stage	To records at each stage
3	Table Fields	To record fields within a table

Security Levels

Level 1: Security Roles

Permissions that users and groups are granted for platform elements



Security Levels

Level 2: Workflow Stage

Workflow permissions supersede security role

Group access:	<input type="text" value="Enter a Group name"/>
	GROUPS VIEW ALL ITEMS EDIT TRANSITION
	Everyone <input type="button"/> <input type="button"/> <input type="button"/> <input type="button"/>
User access:	<input type="text" value="Enter a User name"/>
	USERS EMAIL VIEW ALL ITEMS EDIT TRANSITION
	User One firstname.lastname@ <input type="button"/> <input type="button"/> <input type="button"/> <input type="button"/>

Security Levels

Level 3: Table Fields

Configure to allow specific users and groups access to the field

Defaults to “everyone” with “edit” permissions

The screenshot displays a configuration interface for security levels. It is divided into two main sections: 'Group Access' and 'User Access'.
Group Access: A dropdown menu labeled 'Enter a Group name' is shown. Below it, a table lists 'Everyone' under the 'GROUPS' column, with an 'EDIT' button in the top right corner and a trash can icon in the bottom right corner.
User Access: A dropdown menu labeled 'Enter a User name' is shown. Below it, a table lists 'User One' under the 'USERS' column, with an 'EMAIL' column showing 'firstname.lastname@noreply.com'. To the right of the user list are three icons: a trash can, an edit button, and a search icon.

**A user must have permission to the table and/or permission to the workflow stage where the record resides.*

Creating groups and users

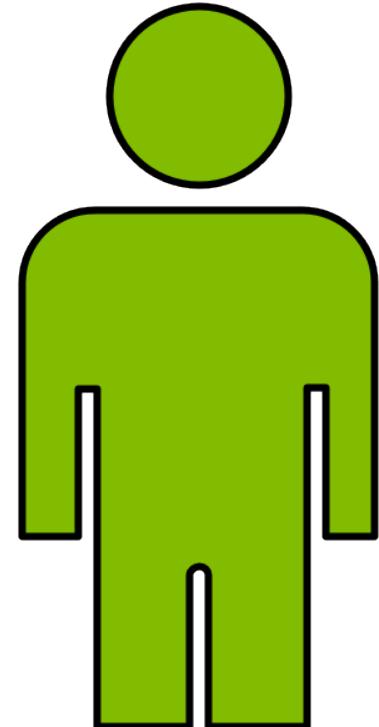
Assign users to groups, and groups to security roles



Security Roles



Groups



Users

Groups

Create groups to assign permissions and for reporting



Groups



Incident reporter (security *role*)

IT Group

CISO – Tom H. *user*

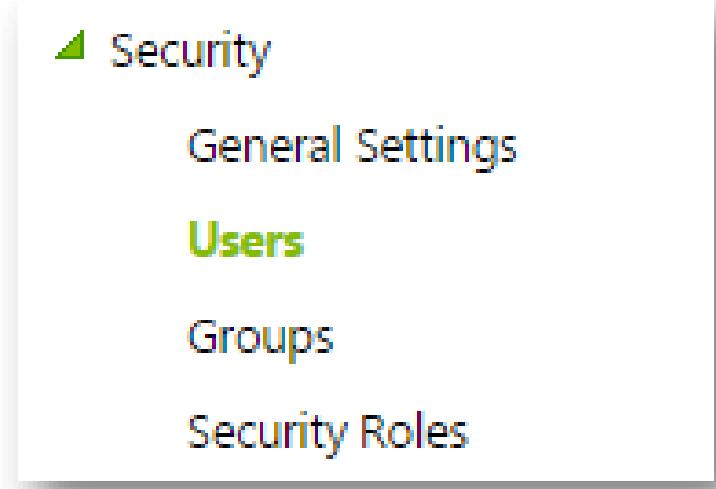
CISSP – Karen B. *user*

Engineer – Mary S. *user*

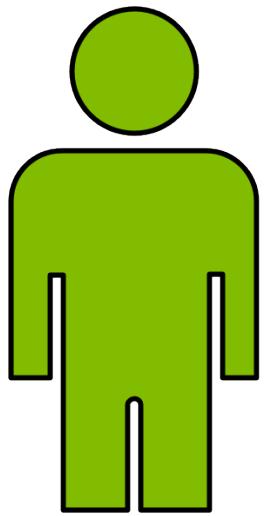
Users

Users are identified as either:

- Full user
- Awareness user



- ▲ Security
- General Settings
- Users
- Groups
- Security Roles



Users

New User Creation

First name:	<input type="text"/>
Middle name:	<input type="text"/>
Last name:	<input type="text"/>
Title:	<input type="text"/>
Email:	<input type="text"/>
Home Phone:	<input type="text"/>
Work Phone:	<input type="text"/>
Mobile Phone:	<input type="text"/>
Fax:	<input type="text"/>
Account Type:	<input checked="" type="radio"/> Full User <input checked="" type="radio"/> Awareness User
Authentication Type:	<input checked="" type="radio"/> Keylight <input type="radio"/> LDAP <input type="radio"/> SAML
Username:	<input type="text"/>
Password:	<input type="text"/>
Confirm password:	<input type="text"/>
Status:	<input checked="" type="radio"/> Active <input type="radio"/> Inactive <input type="radio"/> Locked
Security configuration:	<input type="button" value="System User"/>

Keylight Security Roles

Select the security role(s) you want to assign to the user. Each security role determines the permissions the user is granted in Keylight. At least one security role must be assigned to the user.

<input type="checkbox"/>	NAME	DESCRIPTION
<input type="checkbox"/>	Administration	
<input type="checkbox"/>	Default Awareness User	
<input type="checkbox"/>	Risk Managers	

Groups

Select the group(s) to which you want to add the user.

<input type="checkbox"/>	NAME	MEMBERS
<input type="checkbox"/>	Anonymous Incident Analysts	17
<input type="checkbox"/>	Business Continuity Plan Approvers	17
<input type="checkbox"/>	Business Continuity Plan Authors	17
<input type="checkbox"/>	Compliance Document Approvers	17
<input type="checkbox"/>	Compliance Document Authors	17
<input type="checkbox"/>	Exception Analysts	17

Authentication Management

Single Sign On (SSO) options

Manage user accounts using LDAP or SAML 2.0 to authenticate users

LDAP - Lightweight Directory Access Protocol

SAML - Security Assertion Markup Language

- ▲ **Keylight Platform**
 - ▷ Assessments
 - ▷ Branding
 - ▷ Reporting
 - ▷ Security
- ▲ **Single Sign-On**
 - LDAP
 - SAML



Keylight® Platform Fundamentals

Table Management

Objectives

- Learn about DCF - Dynamic Content Framework
- Identify table types and purpose
- Define field types
- Manage form layouts
- Setup conditional rules

Keywords

Term	Description
Field	A data element in a database table.
Form tab	Presentation of fields on a record's tab for logical layout of fields for user entry and context.
Record	A related set of fields residing on a parent table
Table	Contains forms and fields for creating new records, a central grouping of user-defined and related information.
Table types	Content table, Lookup table, Analytics table

Table Basics

Dynamic Content Framework

- Create custom tables
- Create custom fields
- Modify large volumes of records
- Drag & drop report creation
- Create data linkages



Tables

Tables are unique to each application and are created through the application setup.

Each table must have:

- Unique alias name
- Table Type
- Permissions set by **security role**

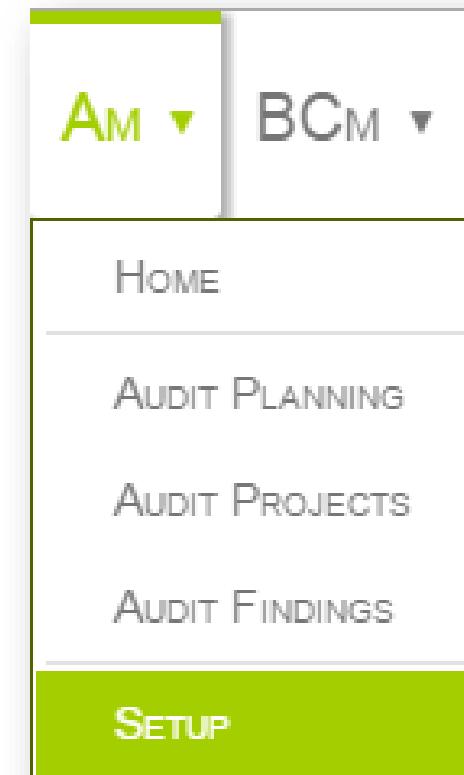


Table types

Standard table types include: content and system lookup.

Type	Description
Content	Captures the actual data based on field types.
System Lookup	Contains a list of values for populating other tables in the same application or in other applications.
Analytics	Add historical context to your data: <ul style="list-style-type: none">-Monitor Key Performance Indicators (KPIs)-Evaluate Key Risk Indicators (KRIs)-Determine benchmarks and monitor trends-Aggregate risk data-Track productivity and performance

Table properties

Tab	Description
General	Identifies the table by unique name and table type.
Permissions	Security roles to which this table is assigned.
Fields	Available fields in the table.
Form Layout	Entry layout as horizontal or vertical and as a single or two-column layout.
Rules	Rules for displaying fields based on defined conditions.
Workflow	Assigned workflows for this table.

Table permissions

Determines access based on the defined security roles.

Risks

	General	Permissions	Fields	Form Layout	Rules	Workflows				
This section displays the permissions that are assigned to the various Keylight Security Roles for this table. Edit the table to modify the permissions.										
SECURITY ROLE	CREATE	READ	UPDATE	DELETE	PRINT/EXPORT	IMPORT/BULK	CREATE	READ	UPDATE	DELETE
Administration	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Default Awareness User										
Risk Manager	✓	✓	✓	✓	✓	✓		✓		
Risk User		✓	✓		✓					

Table permissions

Determines user access to the tables, records and reports.

General Access					Administrative Access				
Create	Read	Update	Delete	Print/Export	Import/Bulk	Create	Read	Update	Delete
Ability to create records and reports Ability to create templates for uploading data contained within an .xls or .csv file and importing it into this table	Ability to view records and reports	Ability to edit records and reports Ability to edit templates for uploading data contained within an .xls or .csv file and importing it into this table	Ability to delete records and reports Ability to delete a set of records in bulk in this table	Ability to export reports	Ability to upload data contained within an .xls or .csv file and import it into this table Ability to edit, delete, and move a set of records in bulk in this table	Ability to create fields, form tabs, and workflow for the table	Ability to view the table	Ability to edit fields, form tabs, and workflow for the table	Ability to delete fields, form tabs, and workflow from the table

*Full descriptions of these permissions can be found through Keylight Help, Search *Security Role*.

Table fields

Create fields to collect data into the table

Risks				
DISPLAY NAME		TITLE	FIELD TYPE	REQUIRED
This grid displays all fields for the table. Click New... to create a new field. Click the links in the Display Name column to modify existing fields.				
+ New...				
Category	Lookup	<input checked="" type="checkbox"/>		Risks
Description	Text	<input checked="" type="checkbox"/>		Risks
Identified At	Date	<input checked="" type="checkbox"/>		Risks
Name	<input checked="" type="checkbox"/>	Text	<input checked="" type="checkbox"/>	Risks
Owner	Lookup			Risks
Priority	Numeric			Risks
Resolved At	Date			Risks
Response Plan	Text			Risks
Risk Rating	Lookup			Risks

[Type Field Display Name]

Field Type:	<input type="text" value="Text"/> <input type="button" value="▼"/>
Alias:	<input type="text"/>
Description:	<input type="text"/>
Required:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Exportable:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Title Field:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Rich Text:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Default Report Field:	<input type="radio"/> Yes <input checked="" type="radio"/> No
Reportable:	<input checked="" type="radio"/> Yes <input type="radio"/> No
Sort By:	<input type="text" value="Select a field"/> <input type="button" value="▼"/>
Maximum Length:	<input type="text" value="100"/>
Group Access:	<input type="text" value="Enter a Group name"/> <input type="button" value="▼"/>
Everyone	<input type="button" value="EDIT"/> <input type="button" value="G"/>
User Access:	<input type="text" value="Enter a User name"/> <input type="button" value="▼"/> <input type="button" value="🔍"/> <input type="button" value="CSV"/>
EMAIL	<input type="button" value="EDIT"/>
No records to display.	
Use Formula:	<input type="radio"/> Yes <input checked="" type="radio"/> No
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Table fields

Field types

Determines the type of information to be entered for this field

Text

Numeric

Date

IP Address

Lookup

Master/Detail

Matrix

Documents

Assessments

Yes/No

Table fields

Field properties

- Required
- Exportable
- Title Field
- Default Report Field
- Reportable

[Type Field Display Name]

Field Type:	<input type="button" value="Text"/>						
Alias:	<input type="text"/>						
Description:	<input type="text"/>						
Required:	<input checked="" type="radio"/> Yes <input type="radio"/> No						
Exportable:	<input checked="" type="radio"/> Yes <input type="radio"/> No						
Title Field:	<input checked="" type="radio"/> Yes <input type="radio"/> No						
Rich Text:	<input checked="" type="radio"/> Yes <input type="radio"/> No						
Default Report Field:	<input checked="" type="radio"/> Yes <input type="radio"/> No						
Reportable:	<input checked="" type="radio"/> Yes <input type="radio"/> No						
Sort By:	<input type="button" value="Select a field"/>						
Maximum Length:	<input type="text" value="100"/>						
Group Access:	<input type="button" value="Enter a Group name"/>						
<table border="1"><thead><tr><th>GROUPS</th><th>EDIT</th></tr></thead><tbody><tr><td>Everyone</td><td><input type="button" value="Edit"/> <input type="button" value="Delete"/></td></tr></tbody></table>		GROUPS	EDIT	Everyone	<input type="button" value="Edit"/> <input type="button" value="Delete"/>		
GROUPS	EDIT						
Everyone	<input type="button" value="Edit"/> <input type="button" value="Delete"/>						
User Access:	<input type="button" value="Enter a User name"/>						
<table border="1"><thead><tr><th>USERS</th><th>EMAIL</th><th>EDIT</th></tr></thead><tbody><tr><td colspan="3">No records to display.</td></tr></tbody></table>		USERS	EMAIL	EDIT	No records to display.		
USERS	EMAIL	EDIT					
No records to display.							
Use Formula:	<input checked="" type="radio"/> Yes <input type="radio"/> No						
<input type="button" value="Save"/> <input type="button" value="Cancel"/>							

Field properties displayed here for **Text** field type.

Table fields

Field-level permissions

By default, set to Group Access “Everyone”

Can be configured to allow only specific users or groups

The screenshot shows a configuration interface for table fields. It has two main sections: 'Group Access' and 'User Access'.
Group Access: A search bar labeled 'Enter a Group name' contains the placeholder 'Everyone'. Below it is a 'GROUPS' section with a single entry 'Everyone' and edit buttons ('EDIT', 'Delete', 'Edit').
User Access: A search bar labeled 'Enter a User name' is empty. Below it is a 'USERS' section with a sub-section 'EMAIL' and an 'EDIT' button. The message 'No records to display.' is shown in this section.

Form layout

Drag-and-drop available fields onto the layout

Layout

Available Fields	Single Column	Two Column
Blankhelperdate	Device Type	Acquisition Cost
Device Name	Serial Number	Asset Tag
Procurement Officer	Acquisition Date	Leased
	Device End of Life Date	Support Contract
	Repaired or Expired	Support Contract Expiration
	Date Returned to In-Service	

* Device Name:

Device Information Lease Information Assignment

This tab contains the fields for collecting device specific information

Device Type: <input type="text"/> <input style="width: 20px; height: 20px; vertical-align: middle;" type="button" value="..."/>	Acquisition Cost: <input type="text"/>
Serial Number: <input type="text"/>	Asset Tag: <input type="text"/>
Acquisition Date: <input type="text"/> <input style="width: 20px; height: 20px; vertical-align: middle;" type="button" value="..."/>	Leased: <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> No Value
Device End of Life Date: <input type="text"/> <input style="width: 20px; height: 20px; vertical-align: middle;" type="button" value="..."/>	Support Contract: <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> No Value
Repaired or Expired: <input type="radio"/> Yes <input type="radio"/> No <input checked="" type="radio"/> No Value	Support Contract Expiration: <input type="text"/> <input style="width: 20px; height: 20px; vertical-align: middle;" type="button" value="..."/>
Date Returned to In-Service: <input type="text"/> <input style="width: 20px; height: 20px; vertical-align: middle;" type="button" value="..."/>	

Form layout

Field Type Display Properties

Fields are displayed in different sizes based on certain variables.

Field Type	Small Field Type	Large Field Type
Text (< 500 Chars)	●	
Text (> 500 Chars)		●
Numeric	●	
Date	●	
IP Address	●	
Lookup (1-to-1) with 0 or 1 display column	●	
Lookup (1-to-1) with > 1 display column		●
Lookup (1-to-Many)		●
Master/Detail		●
Matrix		●
Documents		●
Assessments		●
Yes/No	●	

Small Field Types vs. Large Field Types Classifications

Rules

Apply conditional rules to fields and tabs to dynamically hide or require information

[Type Rule Name]

Description:			
Condition:	Select a field	=	Type to select an item...
Tabs:	Type to select an item...		
FIELDS:	Select a field		

Save Cancel

The screenshot shows a software interface for creating a rule. At the top, there's a text input field labeled "[Type Rule Name]". Below it, there are several configuration sections: "Description:" with an empty text area, "Condition:" with dropdown menus for selecting a field, an operator (=), and a target item, "Tabs:" with a dropdown menu for selecting an item, and "Fields:" with a dropdown menu for selecting a field. Each of these sections has a corresponding "No records to display." message below it. At the bottom right, there are "Save" and "Cancel" buttons.



Keylight® Platform Fundamentals

Record Import

Objectives

- Understand the import process
- Understand user import permissions
- Run the import process

Keywords

Term	Description
Target table	The table where the import is created.
Field mappings	Correlation of source field to target field.
Source field	The columns in the import file eligible for mapping to the fields in the target table.
Target field	The list of fields in the table that to which you can map the source fields.

Record Import Basics

Import/Bulk Ops

Import data from an .xls, .xlsx, or .csv file into a table

Home > Assets > Facilities > Import / Bulk Ops > Create Template

Enter Name

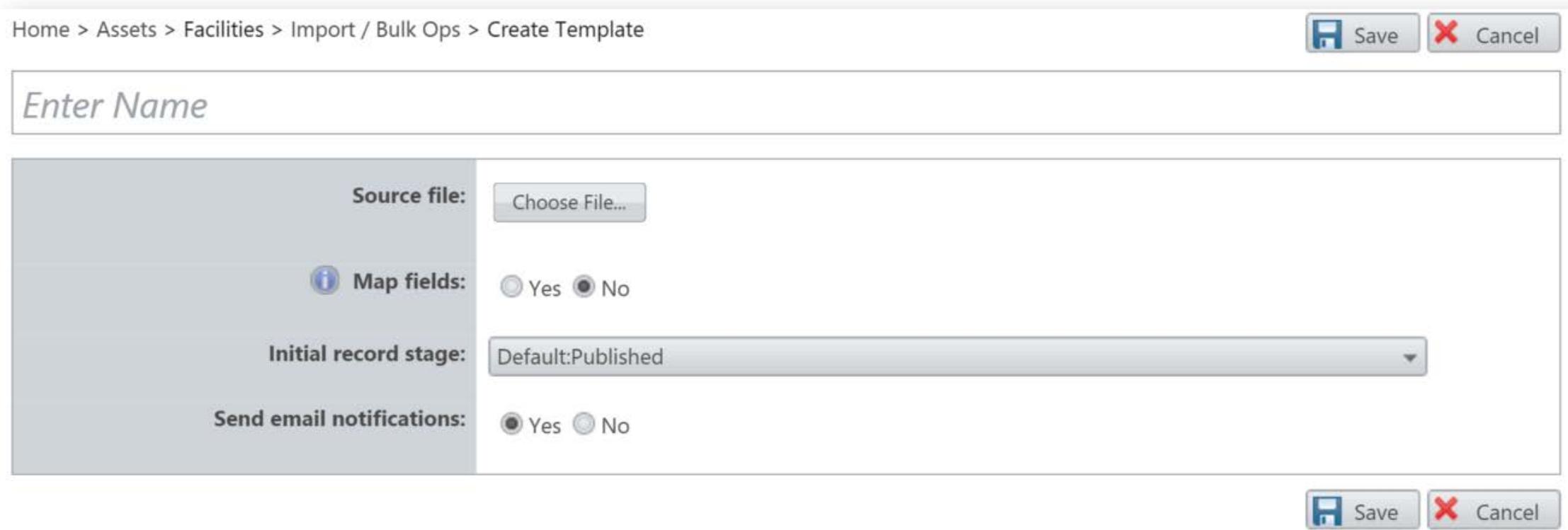
Source file: Choose File...

Map fields: Yes No

Initial record stage: Default:Published

Send email notifications: Yes No

Save **Cancel**



Required permissions for importing

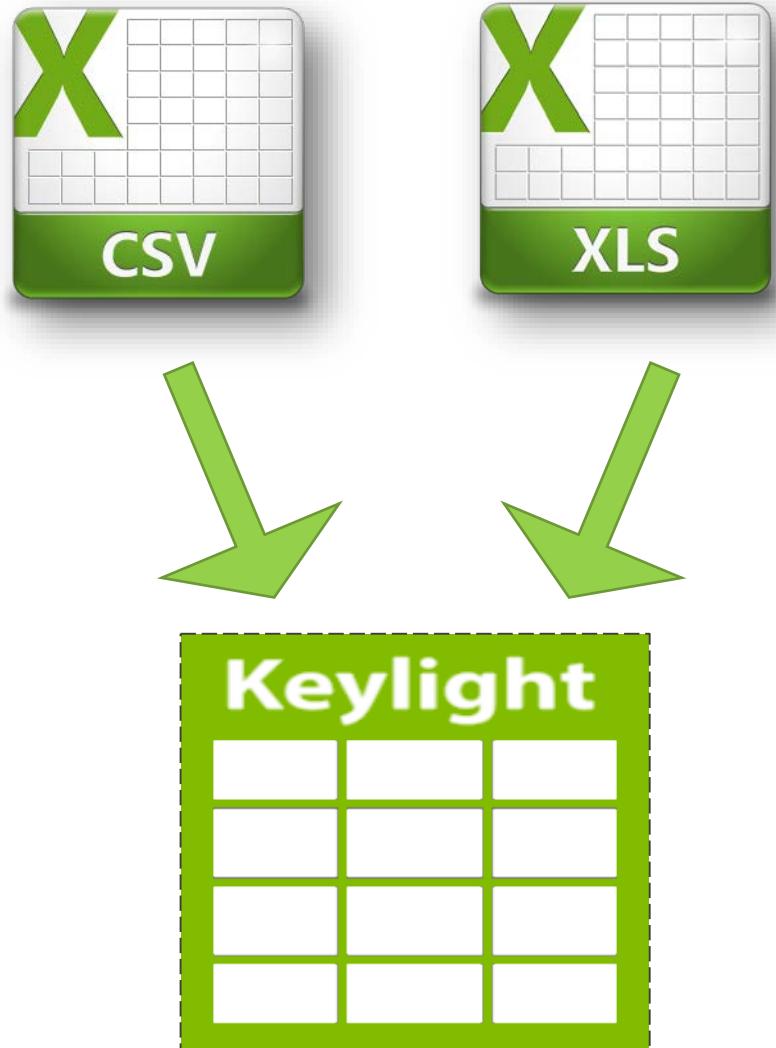
Permissions

Component	General Access						Administrative Access			
	Create	Read	Update	Delete	Print/Export	Import/Bulk	Create	Read	Update	Delete
Devices	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Equipment	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Exception Requests	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Exceptions							✓	✓	✓	✓
Facilities	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Finding Remediation Stati	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Finding Stati	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Functional Roles	✓	✓	✓	✓	✓		✓	✓	✓	✓

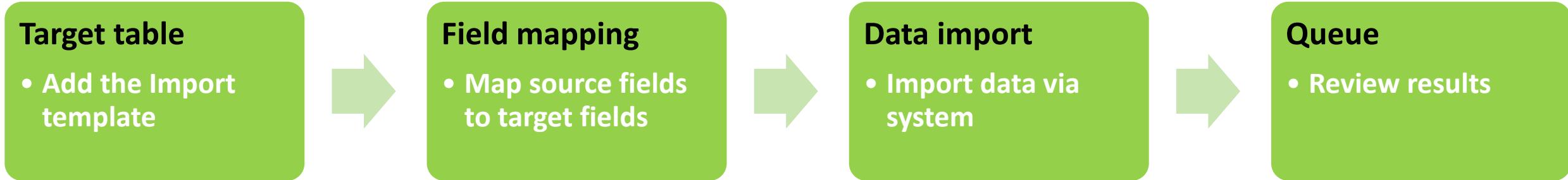
Importing Records

Use Case

- Import existing content into the Keylight platform
- Consolidate data from other sources
- Streamline reporting and record maintenance



Record Import Process



Target table

- Create an Import template

Step 1

Create an import template for the target table

Home > Assets > Facilities > Import / Bulk Ops > Create Template

Enter Name

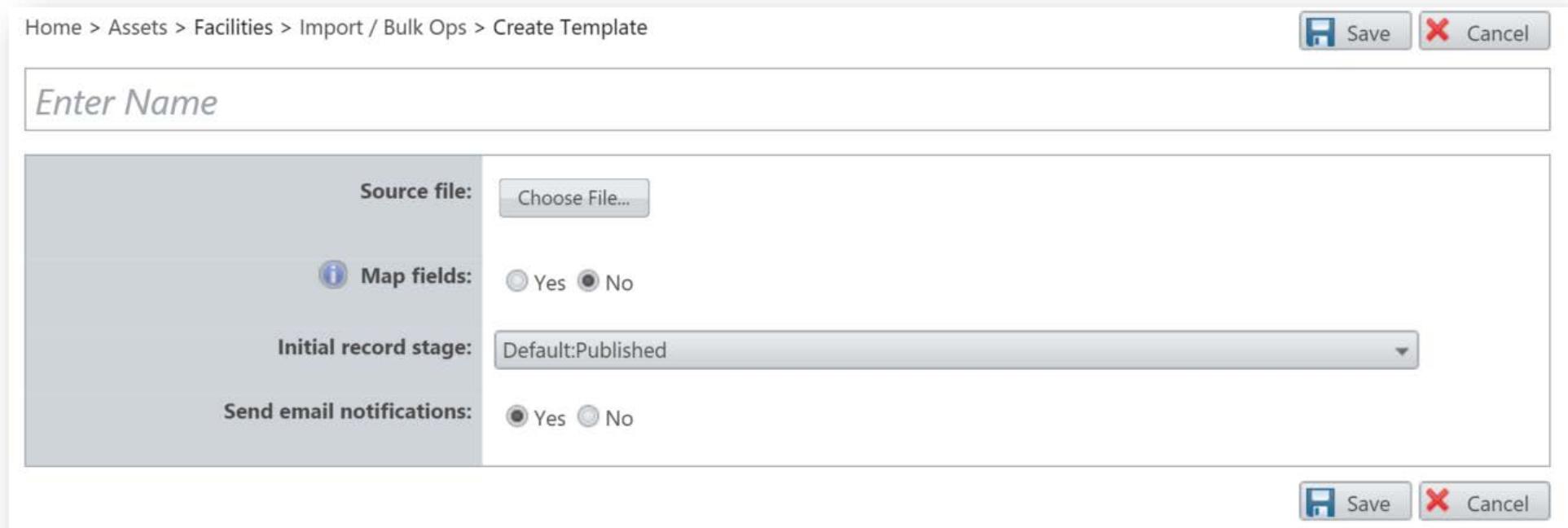
Source file: Choose File...

Map fields: Yes No

Initial record stage: Default:Published

Send email notifications: Yes No

Save **Cancel**



Field mapping

- Map source fields to target fields

Step 2

Determine what to do with the data
(match, populate, or both)

Field Mappings

+ Add...

SOURCE FIELD	TARGET FIELD	MAPPING TYPE		
Device Type:Name	Device Type: Name	Populate		
Support Contract Expiration	Support Contract Expiration	Match		
Serial Number	Serial Number	Populate		
Netbios Name	Netbios Name	Populate		
MSRP	MSRP	Populate		
MAC Address	MAC Address	Populate		
DNS Server	DNS Server	Populate		

Field mapping

- Map source fields to target fields

Match vs. Populate

On a *Match*, data already existing within the table is compared.
If no match is found, a new record gets created.

Populate creates a **new record** for each row of data in the spreadsheet.

Name	Address	City	State	Postal Code
LockPath Northwest Office	125 Main Street	Kansas City	MO	64720
LockPath Northeast Office	455 Central Street	Parkville	MO	64731
LockPath North Office	1778 Antioch	Gladstone	MO	64731
LockPath East Office	13367 Strang Line	Olathe	KS	66210
LockPath Corporate HQ	11880 College Blvd.	Overland Park	KS	66210
LockPath Southwest Office	12257 Park Street	Garnder	KS	66212
LockPath West Office	14456 Lackman Rd.	Lenexa	KS	66212
LockPath East Office	13367 Strang Line	Olathe	KS	66210
LockPath South Office	12279 Arlington	Kansas City	KS	66220
LockPath Southeast Office	1336 Lamont	Lawrence	KS	66221
LockPath Corporate HQ	11880 College Blvd.	Overland Park	KS	66210

Data import

- Import data via system

Step 3

Queue the data import

Home > Assets > Facilities > Import / Bulk Ops > test

 Import Template successfully created.

Add the source file to import queue.

Facilities Import

Source file:	LP_Fundamentals_IMPORT_Facilities.xlsx
Map fields:	Yes
Initial record stage:	Default:Published
Send email notifications:	Yes

Import File **Edit**

Queue

- Review results

Step 4

Send notification when import is completed

Review the import history for queued and processed import status

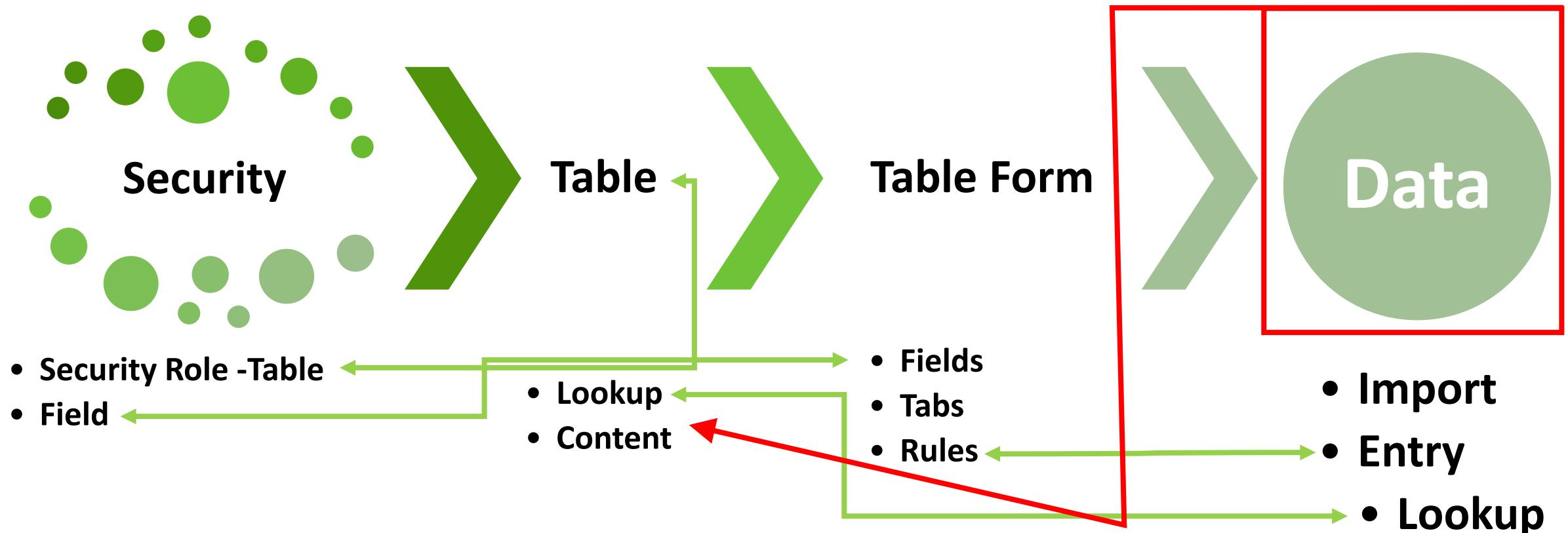


Import History

Data File	Created	Updated At	Status	Message	Failed Records
3006-Facility Import_job aid.xlsx	user admin - 3/10/2015 6:52:00 PM	3/10/2015 6:52:40 PM	Successful	Import succeeded.	

Page Size: 10 ▾ 1 - 1 of 1

Record Creation Process





Keylight® Fundamentals

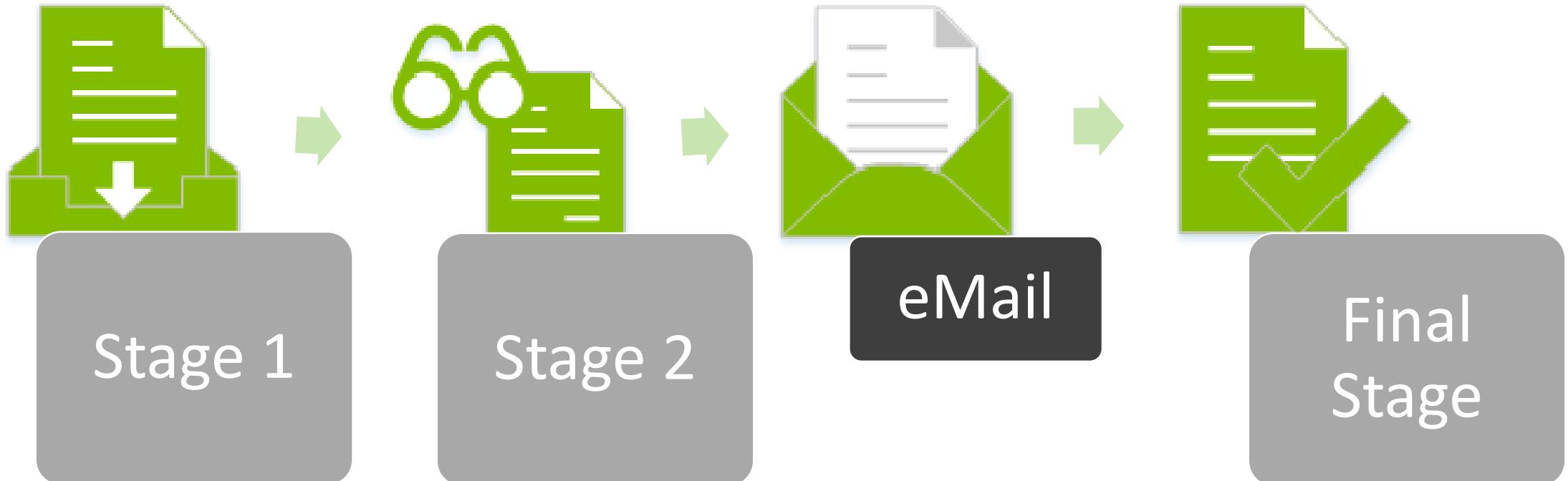
Workflow Management

Objectives

- Create a workflow process consisting of stages, transitions, and notifications.
- Leverage the workflow owner setting for added functionality.
- Identify security options for workflow stages.
- Understand notifications for applicable workflow stages.

Workflow purpose

- Process flow
- Access to records
- Sending notifications



Workflow permissions

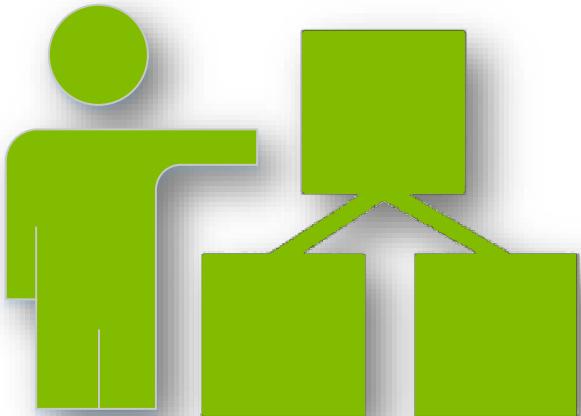
Plan user access to the workflow and its stages

Roles	Workflow Permissions
Workflow owners	Assigned on the workflow
Groups/Users Access	Assigned to each stage
Use assignments	Assigned to each stage

Workflow permissions

Workflow Owner

Assigned to Groups and/or Users

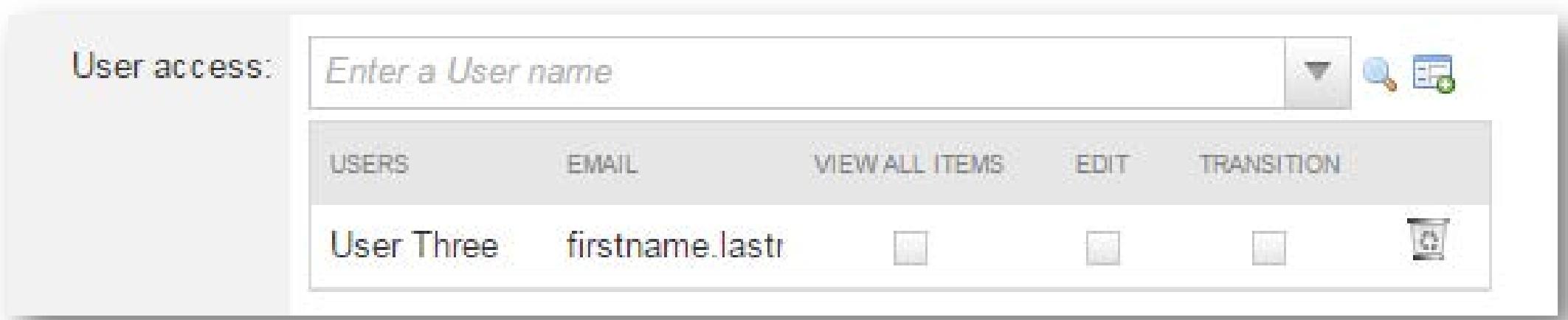


- View all records in all stages
- Move records from one stage to another regardless of set processes
- Reassign a record to a different process

Workflow

Stage permissions

- Users assigned to stage without permissions “View My” is implied
- Assign permissions to users/groups on each stage:
 - View All Items, Edit, Transition



Workflow

Use Assignment

Dynamically and explicitly assign new records to users or groups, based on record selections

Use assignments: Yes No

Select a field ▼

Edit Transition



Use assignments: Yes No

Owner: Vendor: Employee Sponsor ▼

Edit Transition

Stages



Workflow Stage Settings

Routes a record through the workflow by stages

Options	Description
Status	A workflow can be Active or Inactive .
Initial stage	The entry point for new records entering the process.
Voting enabled	Users cast a vote related to a workflow item.

Routing Criteria

Routing criteria: Set rules to direct a record through the intended workflow process

Routing Criteria:

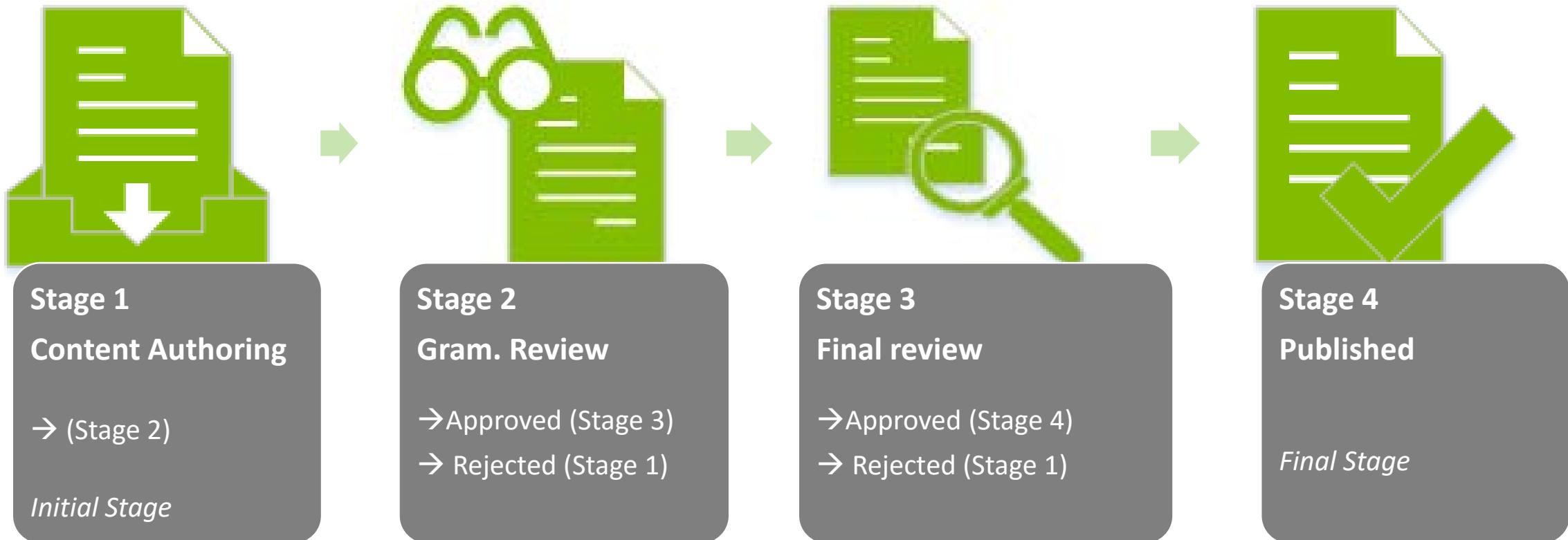
- ▲ Business Units +
 - All
 - ▲ Control Classification +
 - All
 - ▲ Document Owner +
 - All
 - ▲ Impact Zone +
 - All
 - ▲ Parent +
 - All
 - ▲ Source +
 - All
 - ▲ Type +
 - All
- Active: Yes No No Value
- Live: Yes No No Value
- Override Statement: Yes No No Value
- Override Vendor Statement: Yes No No Value

Transitions



Stage transitions

Transitions direct records through workflow stages.



Transitions through voting

Voting rules determine when the record is routed

- Transition on determines when the record is advanced to the next stage
- Auto vote specifies what to do with users who do not respond within a designated period.

Voting enabled: Yes No

Group access:

No records to display.

User access:

No records to display.

Voting rules:

Vote	Label	Send To Stage
Yes	Yep	Published
No	Nope	Published

Transition on: First Yes vote
 Greater than Yes vote
 Unanimous Yes vote

Auto vote: After days from , treat all non-votes as Yes and transition accordingly.

Workflow Notifications

Email notifications



Notify users when a record

- Enters or exits a stage
- Transitions from the stage
(manual or automatic)

Submission Confirmation

Notification **Recipients**

Description:

Subject: This is notification that an item needs your attention.

Body:

Insert Temp... Select a field 'Segoe UI', ... 13px

[RecipientUser]

The Item [ItemLink] arrived on [StageDate] and requires your attention.
If it does not get your attention it will automatically be transitioned [TransitionDate].

[CreationUser]

Send when:

Item enters the stage

Item leaves the stage using: Demote

Item is auto transitioned

4 days After Created At

Email notifications



Recipients:

Send to:

- Field Value
- Users/Groups
- Email Address

Submission Confirmation

Notification Recipients

Send to: All Stage Users

Field value: Select a field

FIELD NAME
No records to display.

Groups: Enter a Group name

GROUPS
Facilities Management

Users: Enter a User name

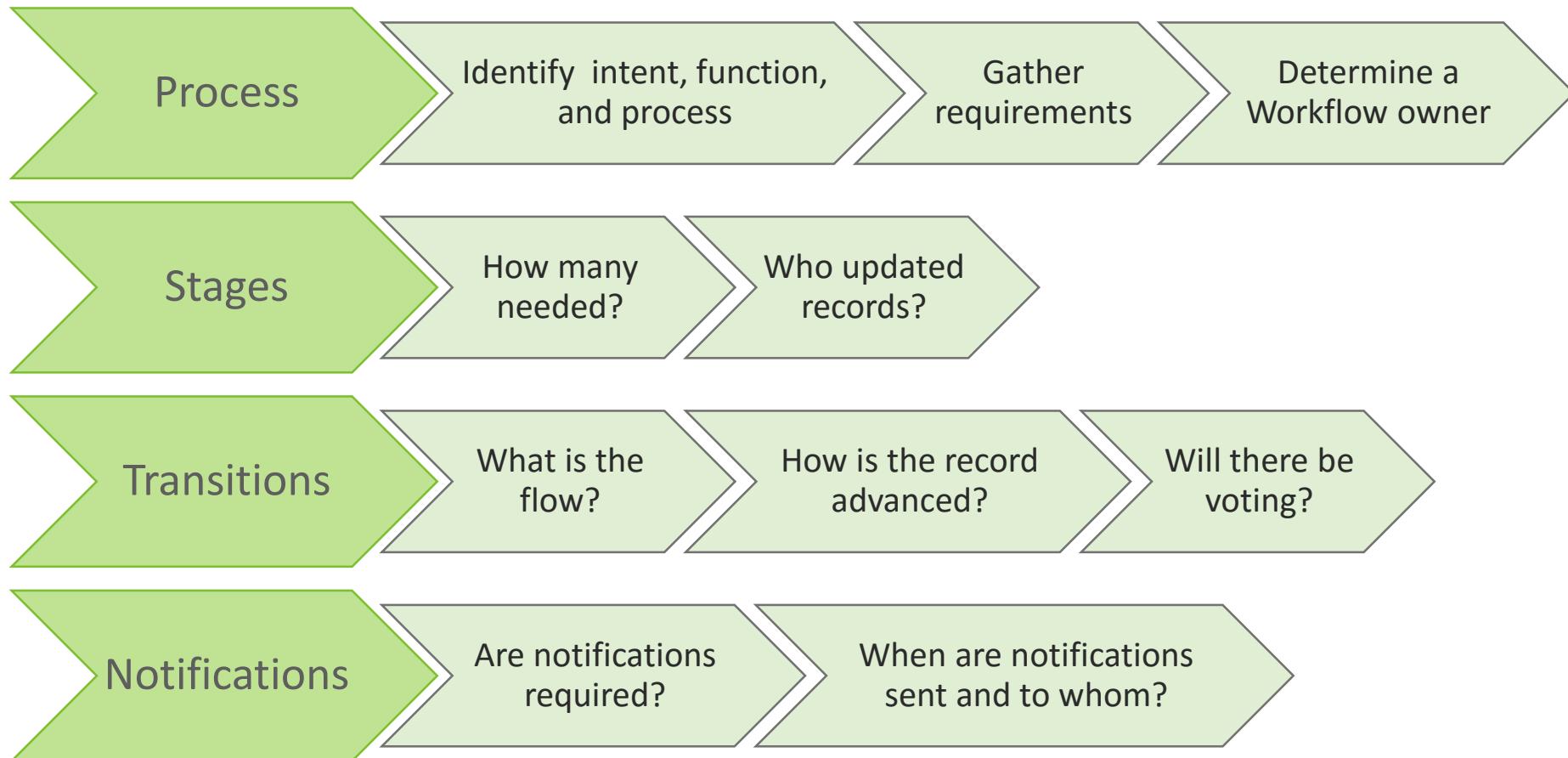
USERS EMAIL
Admin User firstname.lastname@noreply.com

Email address(es): + Add Import

EMAIL
Click Add to add an email address.

A screenshot of a software application window titled "Submission Confirmation". The window has tabs for "Notification" and "Recipients", with "Recipients" currently selected. Under "Recipients", there are four main sections: "Send to" (set to "All Stage Users"), "Field value" (a dropdown menu labeled "Select a field"), "Groups" (a dropdown menu labeled "Enter a Group name" with "Facilities Management" listed), and "Users" (a dropdown menu labeled "Enter a User name" with "Admin User" and the email "firstname.lastname@noreply.com" listed). Below these sections is a section for "Email address(es)" with a "Import" button and a note "Click Add to add an email address." The overall interface is light gray with dark gray borders for the sections.

Plan and build your workflow





Keylight® Fundamentals

Managing Records

Objectives

- Create records and transition them through workflow
- Use the actions menu to perform various functions on a record
- Use the view menu to see record details, history, and linkages
- Perform bulk operations with reporting

Record Lifecycle

Record creation

- Manual creation using the Add New link.
- Import a CSV, XLS, or XLSX file



Record update

- Transition a record
- Move a record
- Copy a record
- Edit a record



Record finalization

- Publish a record through a workflow
- Lock a record
- Delete a record

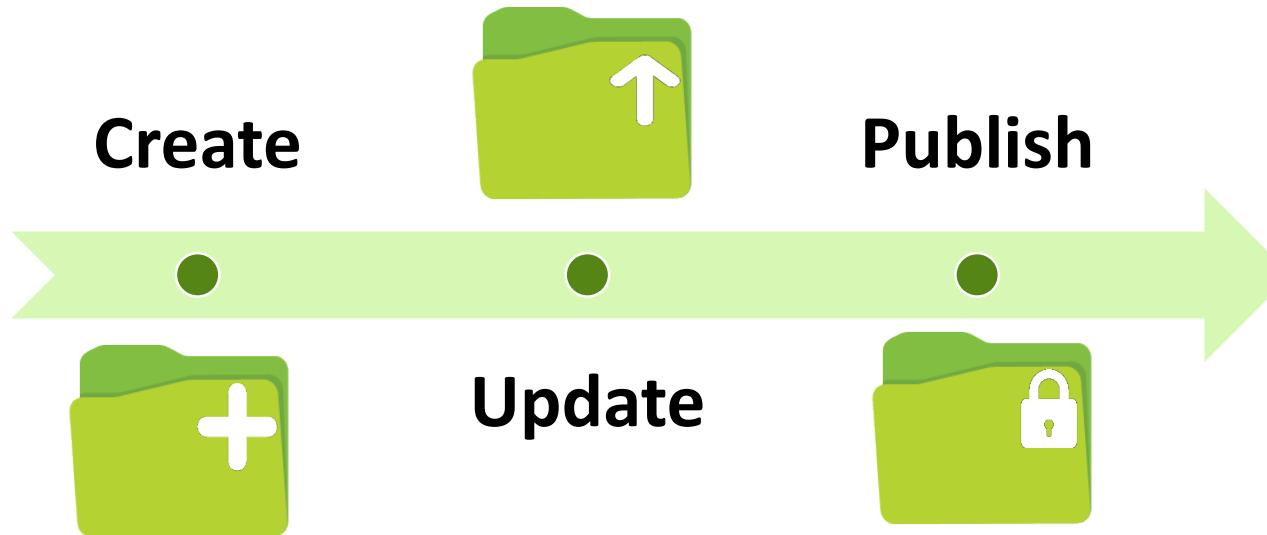


Workflow



Records in workflow

- Records enter the workflow upon creation
- Records move through the workflow upon update and transitions
- Records reach their final stage upon publishing



Records in workflow

Creating records

Create a record from Add New in the tree pane or Create... in the content pane

The screenshot shows the LockPath software interface. On the left, there is a navigation tree with the following structure:

- System Lookup Tables
- Vendor Profiles
 - Add New
 - Import / Bulk Ops
 - Create Report
- Public Reports
- Assessments
- Workflows

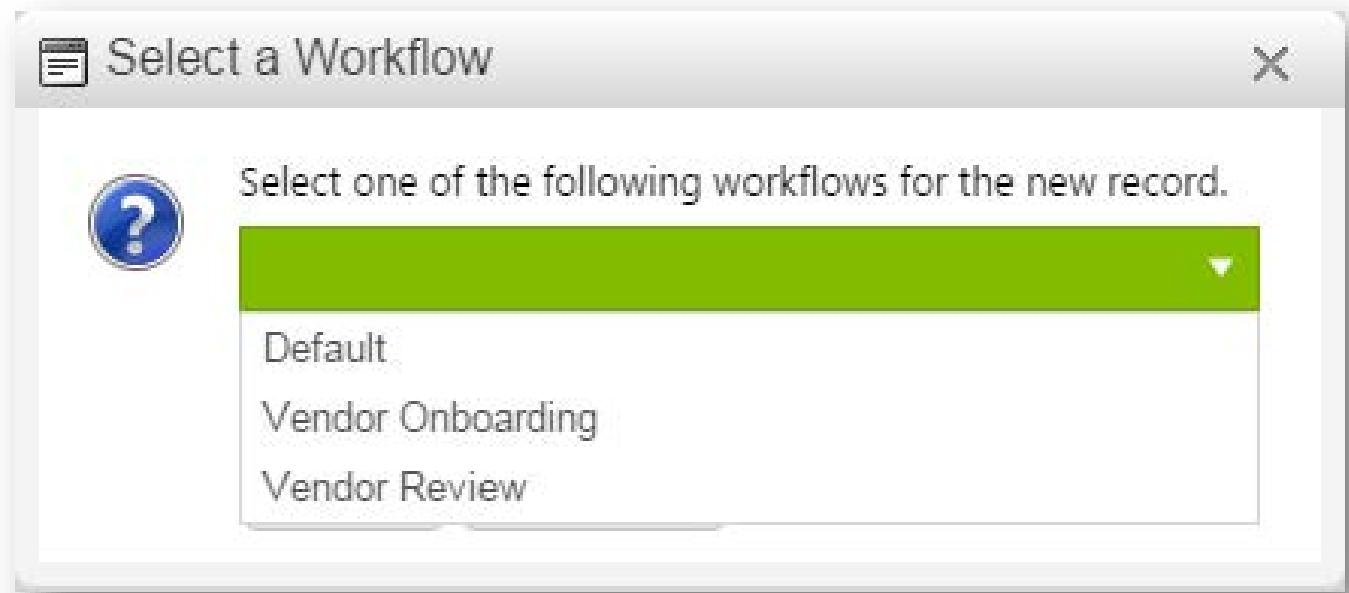
The "Add New" option under "Vendor Profiles" is highlighted. To the right of the tree is a main content area titled "What do you want to do?". It contains a search bar with a placeholder "Search..." and a "Search" button. Below the search bar are two items:

- Create New Vendor (i)
- Bulk Issue Assessments

Records in workflow

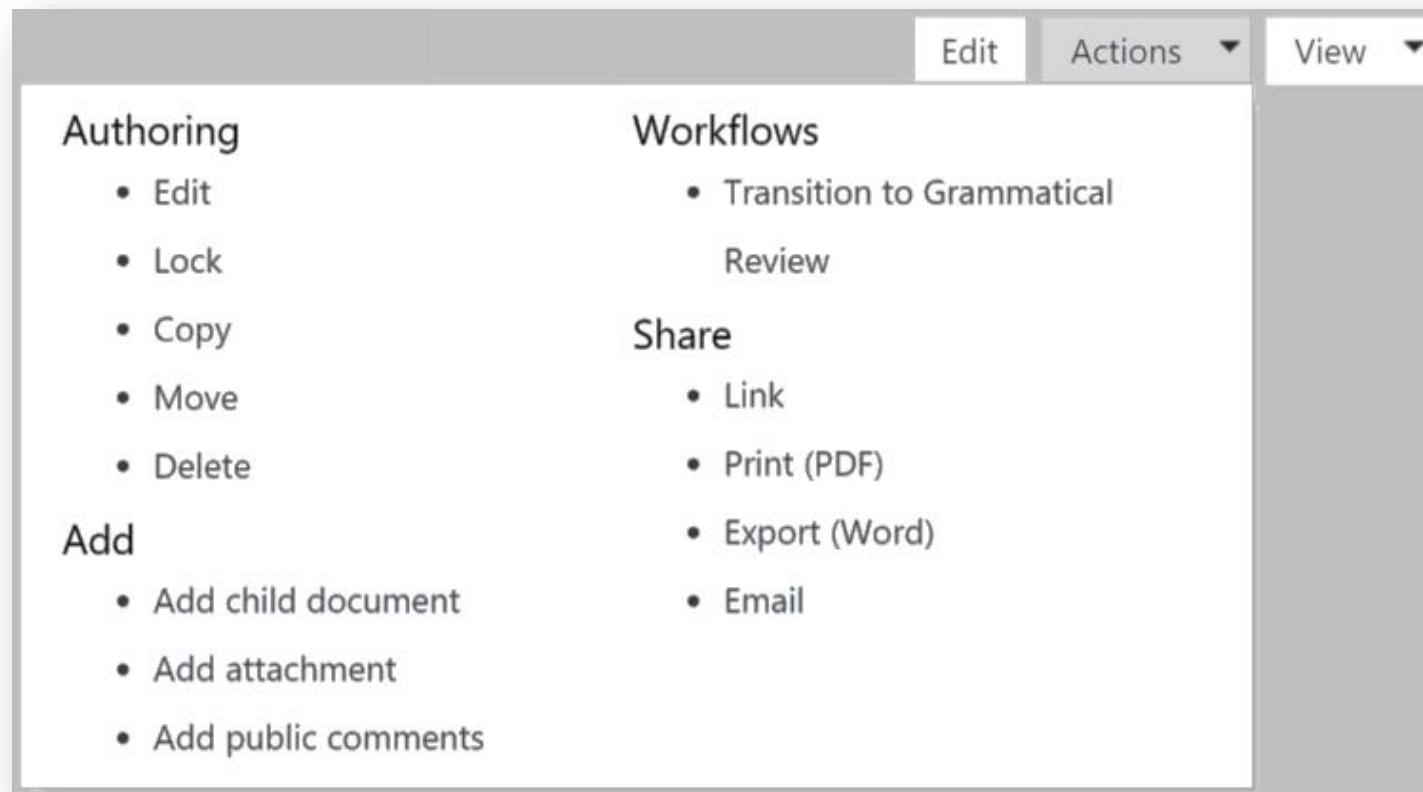
Selecting a workflow

When there is more than one stage, you must select the initial stage of the record.



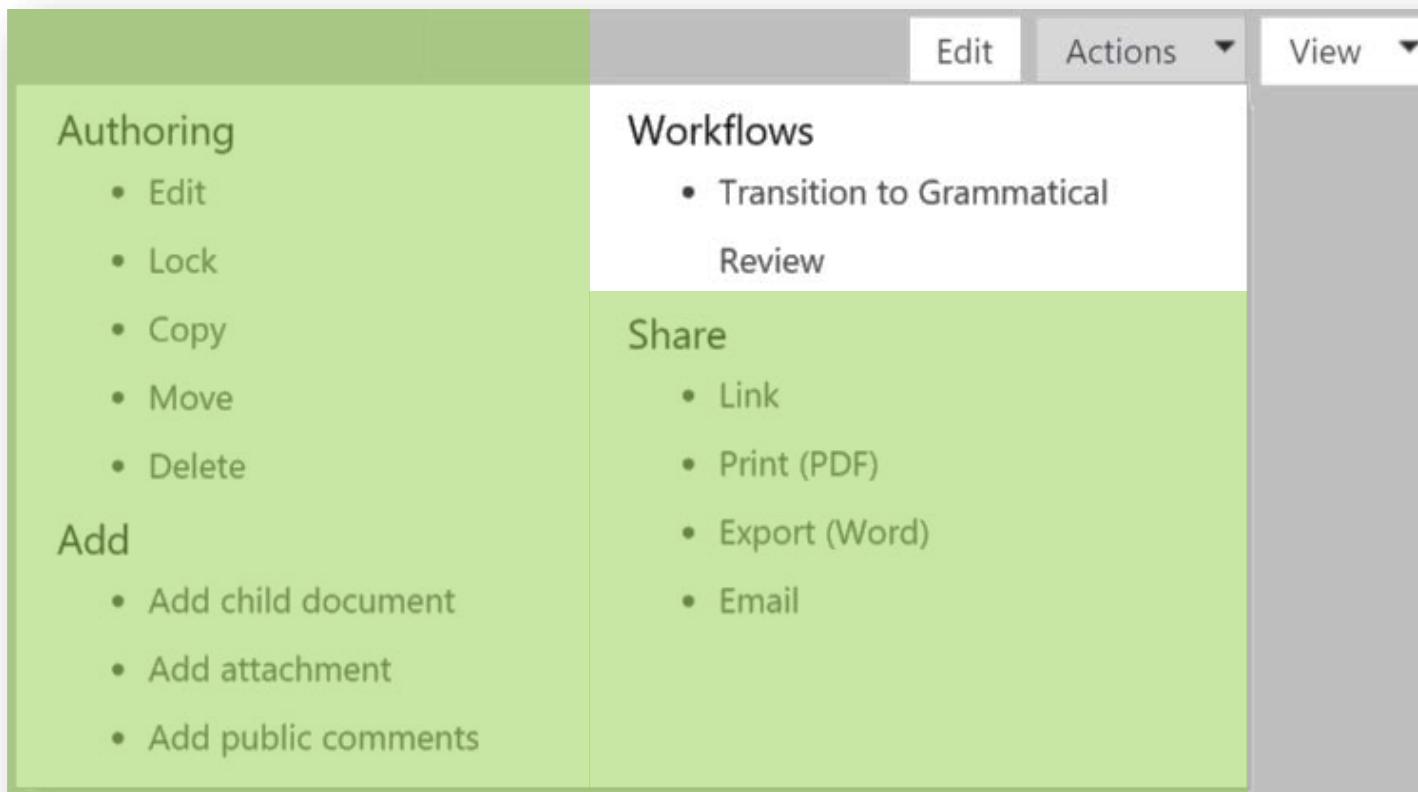
Actions menu

Contains the actions that users can perform on a record



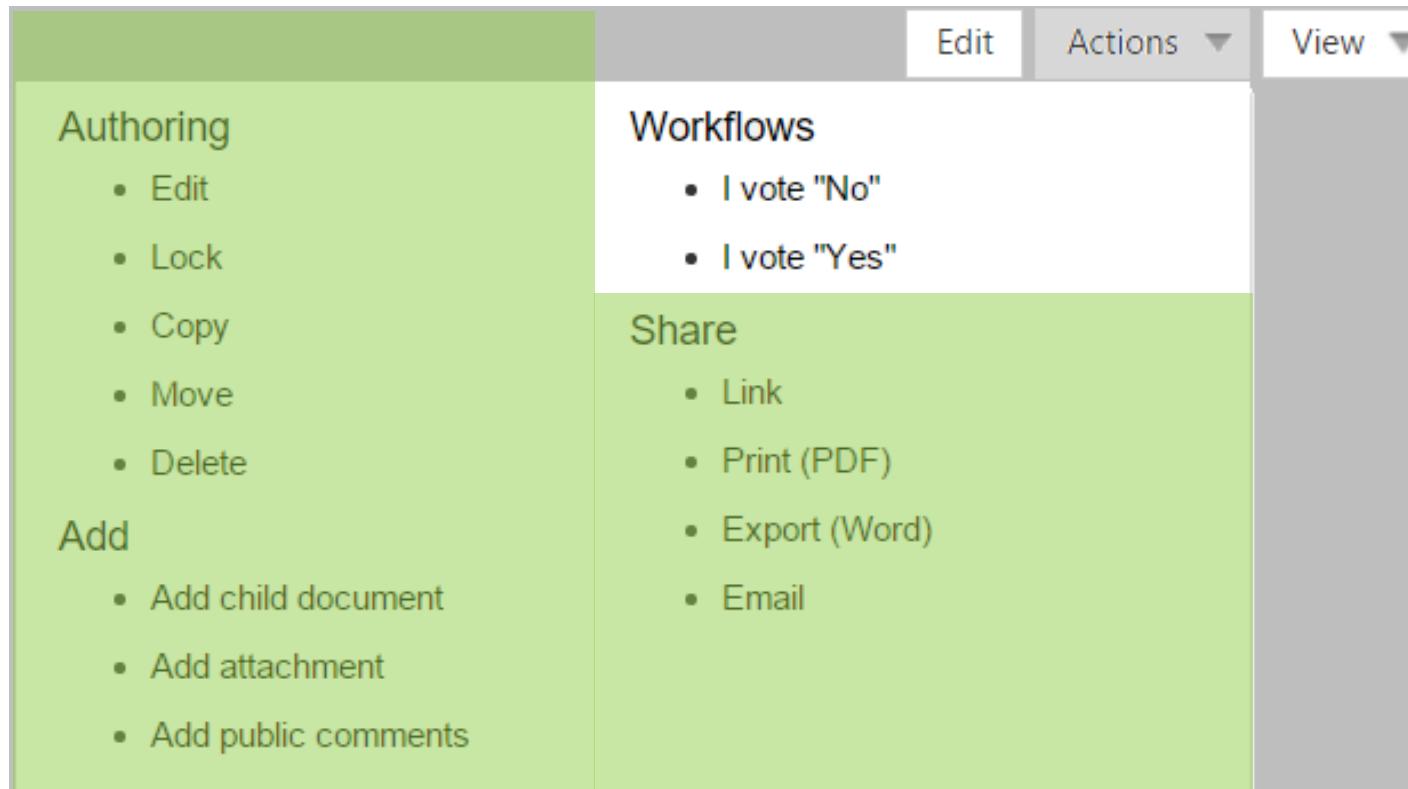
Actions menu

Workflows -Transitions



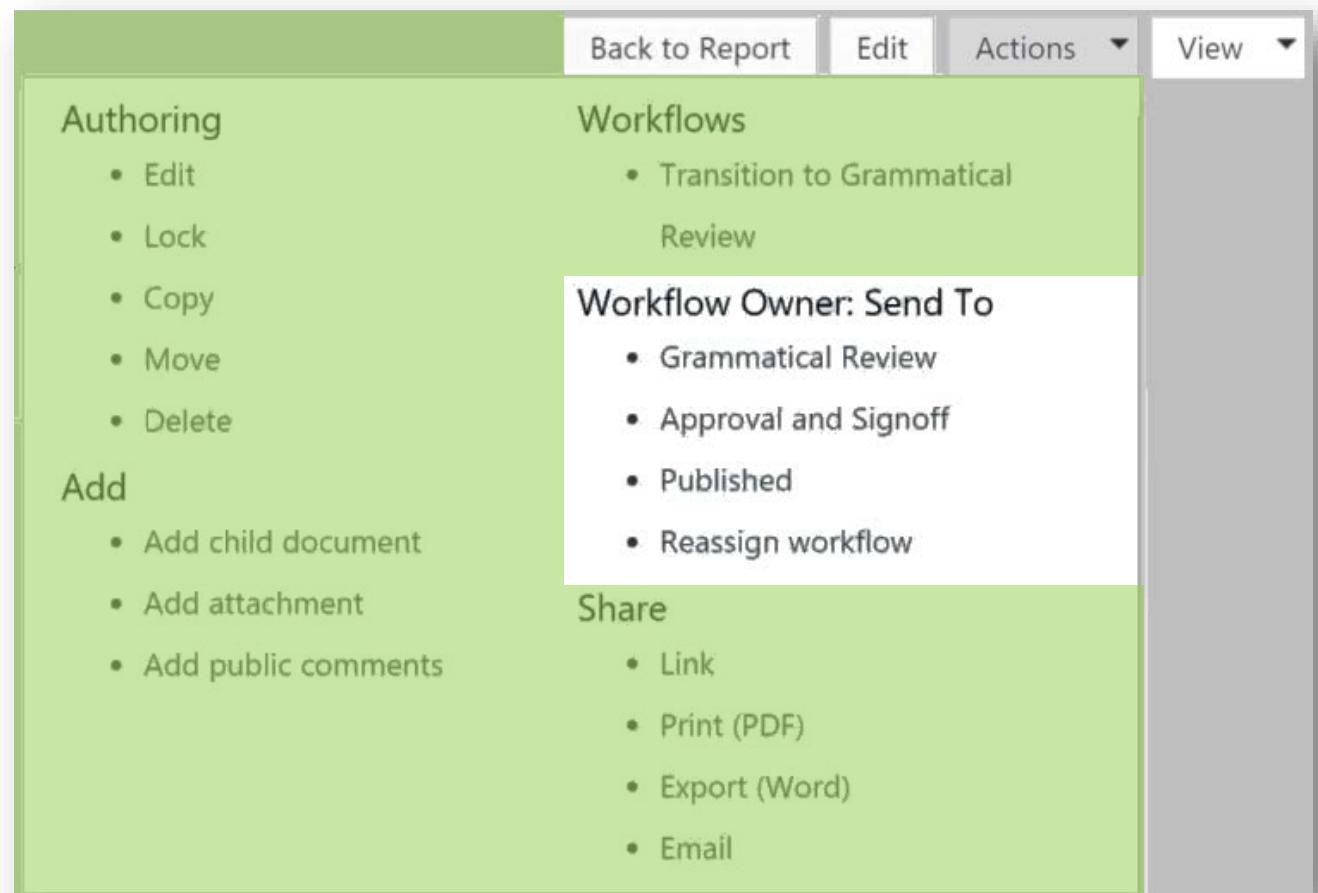
Actions menu

Workflows – Transition through voting



Actions menu

Workflow Owner Options



View menu

Contains the options for viewing the record detail, linkages, and related records.

Back to Report Edit Actions ▾ View ▾

Details <ul style="list-style-type: none">• Detail View• Attachments (0)• History (6)• Compare• Public comments (0)• Awareness history• Voting history	Linkages <ul style="list-style-type: none">• Controls (11)• Functional roles (0)• Scope (0)• Authority documents (36)• Compliance documents (6)	Referenced By <ul style="list-style-type: none">• Awareness Events (0)• Children (0)• Compliance Document (6)
---	--	--

Workflow notifications



noreply@lockpath.com>

New Policy in Content Authoring

keylightalerts-noreply@lockpath.com

Wed, Mar 9

Dear Admin User,

The [New Policy](#) Is ready for review.

Barnes, Betty

Bulk Operations

Bulk operations

Edit, move, edit/move, or delete multiple records simultaneously

The screenshot shows a software interface for managing exception requests. On the left, there's a sidebar with a search bar and a navigation menu:

- Exception Requests
 - Add New
 - Import / Bulk Ops
 - Create Report
- Public Reports
 - 90 Day Exception Report
 - Compliance Document Exceptions
 - Exceptions Analysis 2014 - grid**
 - Exceptions By Compliance Doc
 - Exceptions By Severity

The main area shows a grid of exception requests with columns for title, CEO Want, and various edit/delete icons. A context menu is open over the first row, showing options: Bulk, Edit, Move, Edit/Move, and Delete. The URL in the browser header is "Home > Exceptions > Exception Requests > Public Reports > Exceptions Analysis 2014 - grid".

Title	CEO Want	Actions
Critical Vulns cannot be patched	Critical Vulns cannot be patched	
Data center Mainframe Password Exception	Data center Mainframe Password Exception	
Emergency Request - Onboard Vendor today	Emergency Request - Onboard Vendor today	
Google Apps data may share anonymous data	Google Apps data may share anonymous data	

Bulk operation rules

The security role must have General Access: Update and/or Delete plus the Import/Bulk permissions.

Permissions

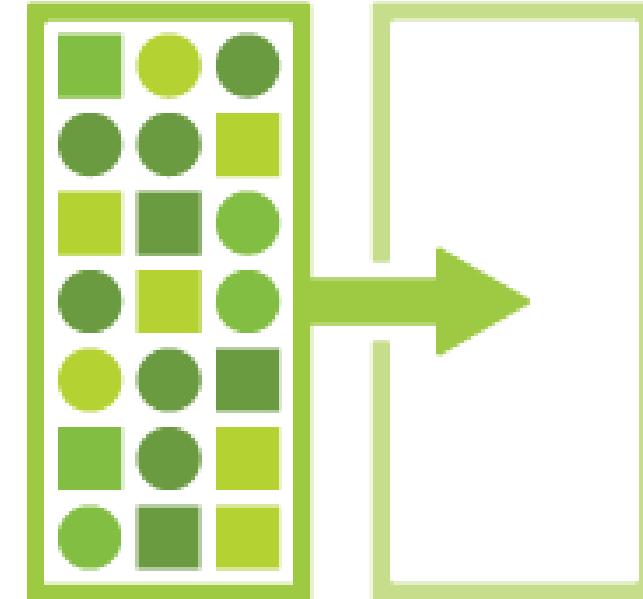
Show: All Components

Component	General Access					Administrative Access				
	Create	Read	Update	Delete	Print/Export	Import/Bulk	Create	Read	Update	Delete
Devices	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Equipment	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Exception Requests	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Exceptions							✓	✓	✓	✓
Facilities	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Finding Remediation Stati	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Finding Stati	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
Functional Roles	✓	✓	✓	✓	✓		✓	✓	✓	✓

Bulk operations record queue

Queue

All records processed through bulk operations are queued for processing.



Queue History

Processed records appear in Queue History



Keylight® Fundamentals

Assessment Management

Purpose

Use assessments to:

- Measure the level of compliancy, policy awareness, and comprehension
- Determine the amount of risk, impact, and vulnerability

**The goal of an assessment is to gain understanding and formulate a recommendation to improve the outcome, or mediate a risk.*

Objectives

- Identify the assessment management process
- Understand the various assessment elements
- Become familiar with the question library
- Identify the purpose of email templates

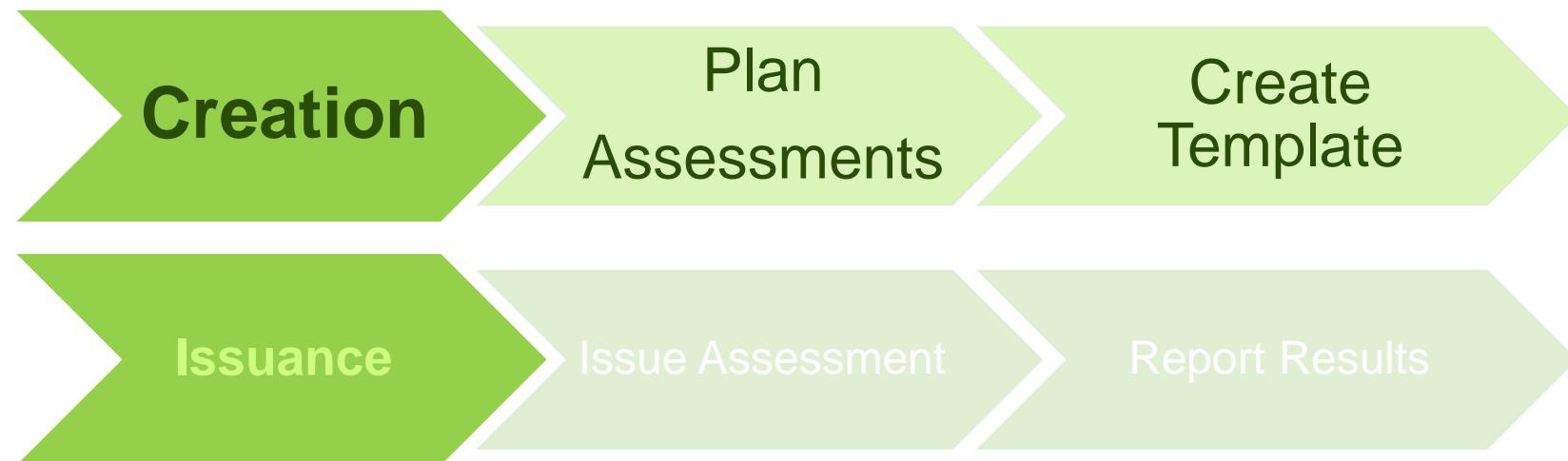
Keywords

Term	Description
Answer set	The options available for a user to choose when responding to a question.
Assessment question library	A collection of user-defined questions that can be used globally, across assessments.
Assessment template	The design of the assessment, the questions to appear in the assessment, and any scoring options.
Cm Assessment category	Organize and control access to certain types of assessments.
Cm Assessment category owner	User or group who can issue assessments to users, and has full access to all assessments in that category.

Assessment Basics

Assessment lifecycle

Assessment planning assists in reaching the intended goal for presenting the desired information.



Planning

Planning is key to developing the assessments for your applications



Key things to consider:

- Intended purpose
- Assessment owner
- Versioning

Permissions

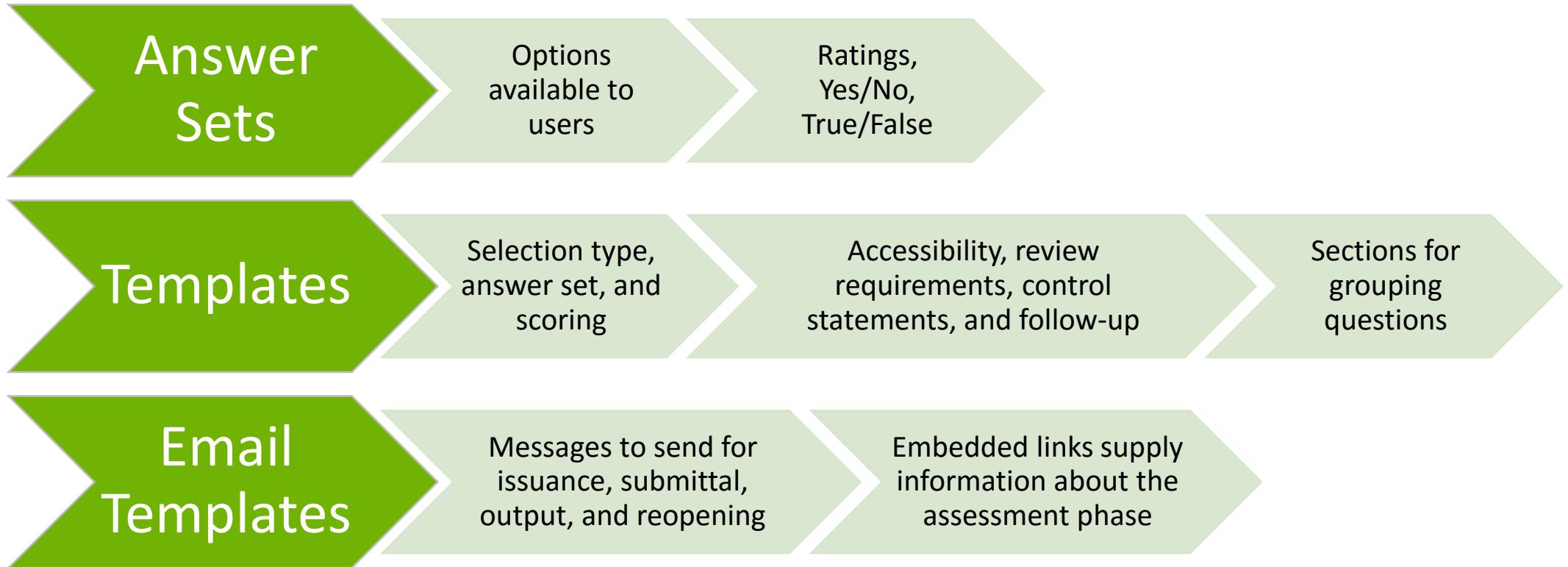


Assessment template creation is an administrative function.

Permissions

Component	General Access					Administrative Access				
	Create	Read	Update	Delete	Print/Export	Import/Bulk	Create	Read	Update	Delete
Assessment Question Library							✓	✓	✓	✓
Assessments (Platform)							✓	✓	✓	✓
Assessments (Cm)	✓	✓	✓	✓	✓		✓	✓	✓	✓
Audit Projects							✓	✓	✓	✓

Recommended process



Answer sets

Available answers a user has to choose from, when responding to a question.

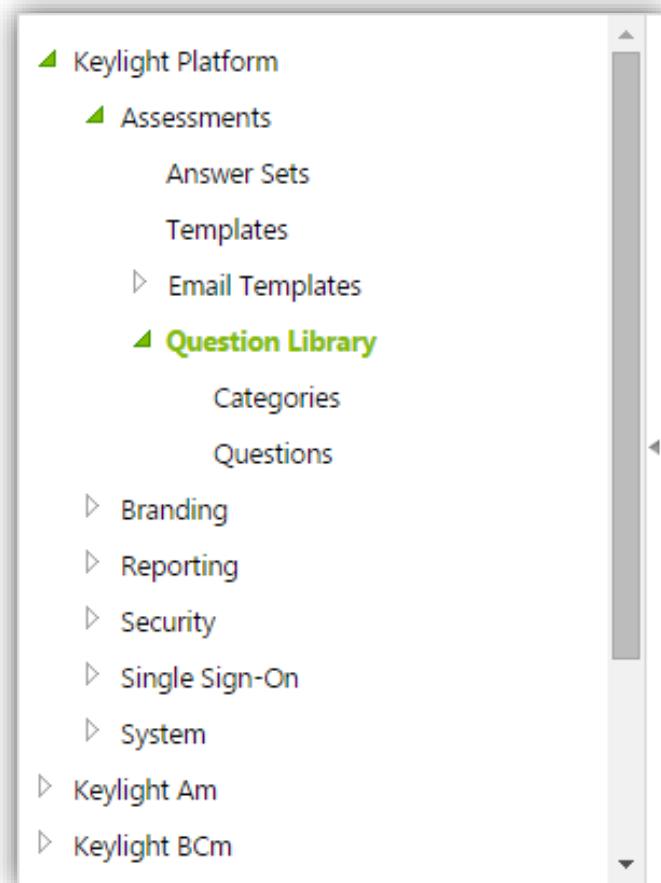


Answer set examples:

- Yes/No
- True/False
- Low/Medium/High
- Excellent/Average/Poor

Question library

- A reusable collection of questions across assessments.
- Library questions can be imported into an assessment.
- Categories organize questions.



Question library



The copy function copies the following items:

- Question text
- Guidance text
- Question type
- Selection type
- Answer set

Assessment Components

Templates

Templates contain the rules for the assessment.

Things to consider:

- Selection method
- Default answer set
- Scoring
- Supporting comments/attachments
- Accessibility
 - Templates
 - Assessments
- Question generation
- Output document linkages

Templates

Sections

- Group questions
- Hide and show sections based on answers
- Restrict access

Visibility

- Always: Section always appears.
- Only visible when: Section appears when a question is answered a particular way.

Select an answer

- Triggers the section to appear.

Restrict access to

- Unrestricted: Section appears to all users.
- Specified groups and users: Section only appears to specific users.

Templates > Sections

Headings

Creates headings for sections within the assessment.

Contents			
Type	Label	Content	
Text Block		"Questionnaire Instructions: For each question choose either Yes, No or N/A from the drop-down menu provided. If N/A is chosen, an explanation is mandatory. Use the ""Additional Information"" field to the right of the question. Click on the instruction pop-up box and drag if necessary."	 
Heading		A. Risk Assessment and Treatment	 
Question	SL.1	Is there a risk assessment program that has been approved by management, communicated to appropriate constituents and an owner to maintain and review the program?	 
Heading		B. Security Policy	 
Question	SL.2	Is there an information security policy that has been approved by management, communicated to appropriate constituents and an owner to maintain and review the policy?	 
Question	SL.3	Have the policies been reviewed in the last 12 months?	 
Heading		C. Organizational Security	 

Templates > Sections

Text blocks

Creates text to provide explanation or guidance within the assessment.

Contents			
Type	Label	Content	
Text Block		"Questionnaire Instructions: For each question choose either Yes, No or N/A from the drop-down menu provided. If N/A is chosen, an explanation is mandatory. Use the ""Additional Information"" field to the right of the question. Click on the instruction pop-up box and drag if necessary."	 
Heading		A. Risk Assessment and Treatment	 
Question	SL.1	Is there a risk assessment program that has been approved by management, communicated to appropriate constituents and an owner to maintain and review the program?	 
Heading		B. Security Policy	 
Question	SL.2	Is there an information security policy that has been approved by management, communicated to appropriate constituents and an owner to maintain and review the policy?	 
Question	SL.3	Have the policies been reviewed in the last 12 months?	 
Heading		C. Organizational Security	 

Templates > Sections

Questions

Custom questions in addition to the auto-generated questions.

Number/Label:

Question:

Guidance:

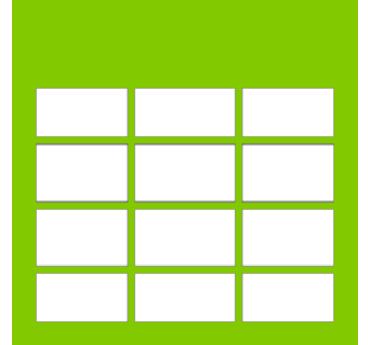
Type: List of Values

Selection type: Single-select Multi-select

Answer set: Yes/No

The interface consists of two main sections, each with a top input field and a rich text editor below it. The first section is labeled 'Number/Label' and 'Question'. The second section is labeled 'Guidance'. Each section has a toolbar with various formatting options like bold, italic, underline, and font size. Below each toolbar is a green 'Design' button and a blue 'HTML' button. At the bottom of the interface, there are additional settings: 'Type' (set to 'List of Values'), 'Selection type' (with radio buttons for 'Single-select' and 'Multi-select' where 'Single-select' is selected), and 'Answer set' (set to 'Yes/No').

Templates > Sections > Questions



Generate findings

Create a record when answered a specific way.

- ✓ Specify the table
- ✓ Select the answers to trigger record creation

Generate findings when:	ANSWER	<input type="checkbox"/>
	Yes	<input type="checkbox"/>
	No	<input checked="" type="checkbox"/>

Templates



Control statements

Include Link controls in the assessment reports

Only questions where the Type is set to
List of Values can have controls linked to them.

Answer Submit Actions ▾ View ▾

Details

- Attachments (0)

Reports

- Compliance Linkages
- Control Audit Report

Templates



Output documents and assessments follow-up

Link output documents to assessment questions.

Issue follow-up assessment automatically based on answers provided.

Assessment review options:	<input checked="" type="checkbox"/> User required to review and acknowledge assessment output documents <input type="checkbox"/> Email notification sent to user on completion
Control statements:	Policy Statement and Control Source Id
Follow-up assessments due:	0 days after issuance

Assessment Email Templates



Create default messages to sent to recipients, regarding assessments.

Types of Email Templates

- **Issuance:** an assessment has been issued.
- **Submission:** an assessment has been completed and submitted.
- **Output:** must review and acknowledge attached documents.
- **Reopen:** a submitted assessment has been reopened.

Issue Assessment Template

Click [Edit](#) to customize the email message that is sent to responders when they are issued an assessment.

Email subject: A new assessment has been issued to you.

Email body: [Recipient],

A new assessment has been issued to you. To begin working on the assessment, log into the Keylight portal. Submit the assessment for review once you have finished answering all questions.

Keylight Portal URL: [KeylightUrl]
Assessment Name: [AssessmentUrl]
Due date: [DueDate]

Thank you.



Keylight® Fundamentals

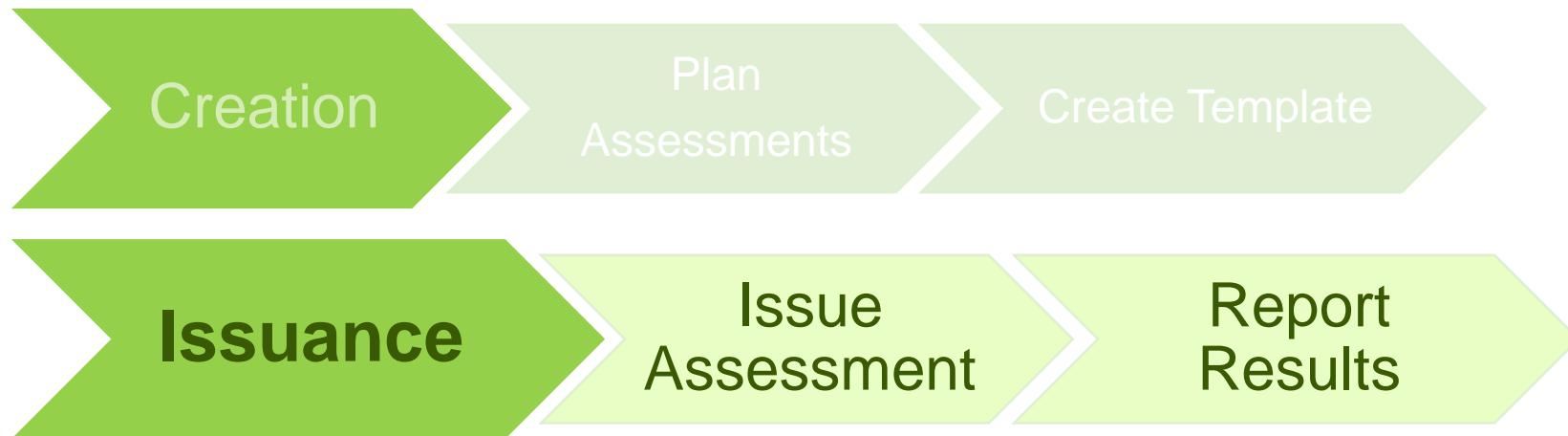
Assessment Issuance

Objectives

- Identify issuance assessment options
- Manage assessment issuance
- Understand results reporting options

Assessment lifecycle

We'll now focus on issuing the assessment and reporting on its results.



Issuance and reporting

Issuance options

- Self assessment
- Internal assessment
- Vendor assessment

** Bulk issuance is only available for vendor assessments*

Assessment Settings

Issue Vendor Assessment

Name:

Assessment Template: ▼

Issue To: ▼

Allow Delegation: Yes No

Requires Review: Yes No

Reviewer: ▼ 

Issuance Type: One-Time Recurring

Issue Date: 

Due Date: 

Prepopulate Prior Answers: Yes No

Assessment Notification Settings

Prepopulate Prior Answers: Yes No

Email Subject: A new assessment has been issued to you.

Email Body:

[VendorContact],

An assessment has been issued to [VendorName] with you as the specified contact. To begin working on the assessment, log into the Keylight Vm portal and enter the credentials issued in a previous email. Submit the assessment for review once you have finished answering all questions.

- Keylight Vm Portal URL: [SiteUrl]
- Assessment Name: [AssessmentUrl]
- Assessment Due Date: [DueDate]

Thank you,

 Design  HTML

Submitted notification: Send email to reviewer when assessment is submitted

Email notification

- Notification of issuance

A new assessment has been issued to you.

keylightalerts-noreply@lockpath.com

Wed, Mar 9, 201

Allen Anderson,

A new assessment has been issued to you. To begin working on the assessment, log into the Keylight portal. Submit the assessment for review once you have finished answering all questions.

Keylight Portal URL: <https://training9.keylightgrc.com/>

Assessment Name: JD New Hire On-boarding Assessment

Due date: 3/31/2016

Thank you.

Private and Confidential

Please note: This email is intended for the use of the individual addressee(s) named above and may contain information that is confidential, privileged or unsuitable for overly sensitive persons with low self-esteem, no sense of humor or irrational beliefs. If you are not the intended recipient, any dissemination, distribution or copying of this email is not authorized (either explicitly or implicitly) and constitutes an irritating social faux pas.

Email notification

- Notification of submission

An assessment has been submitted.

keylightalerts-noreply@lockpath.com

Wed, Mar 9, 201

Betty Barnes,

An assessment has been submitted. To review the assessment, log into the Keylight portal.

Keylight Portal URL: <https://training9.keylightgrc.com/>

Assessment Name: JD New Hire On-boarding Assessment

Thank you.

Private and Confidential

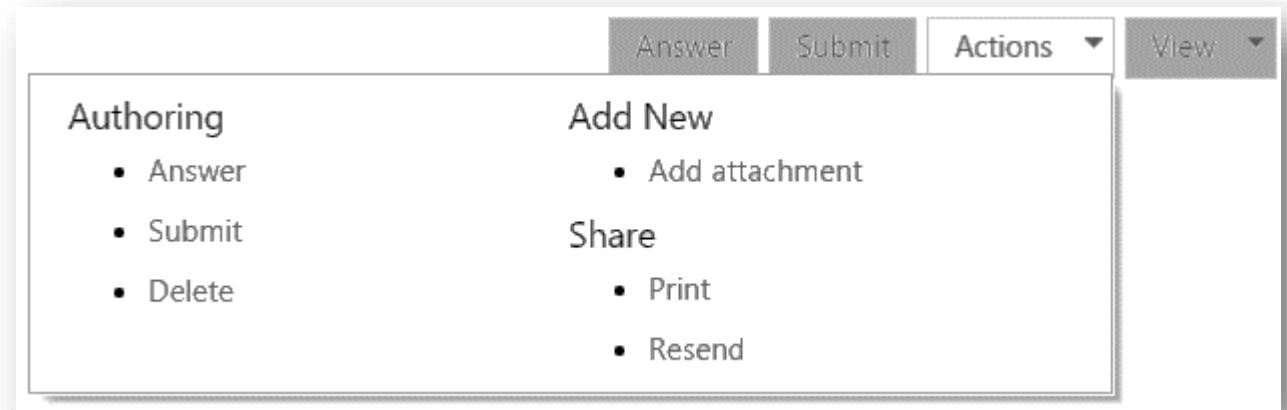
Please note: This email is intended for the use of the individual addressee(s) named above and may contain information that is confidential, privileged or unsuitable for overly sensitive persons with low self-esteem, no sense of humor or irrational beliefs. If you are not the intended recipient, any dissemination, distribution or copying of this email is not authorized (either explicitly or implicitly) and constitutes an irritating social faux pas.

Issuance Management

Managing assessments

Manage assessments from the Actions menu

- Add an attachment to an assessment
- Delete assessments
- Print or export an assessment
- Resend notifications



Vendor assessment activity

View the activity of issued and scheduled assessments for vendors

Name: ABC Hosting

Vendor Profile Assessments

Issued Assessments Scheduled Assessments

+ Complete an Assessment... + Issue an Internal Assessment... + Issue a Vendor Assessment...

NAME	TEMPLATE	ISSUED TO	STATUS	DUE DATE
Vendor Risk Assessment	External Vendor Risk Assessment	Baker, Audrey	Complete	
Vendor Risk Assessment	External Vendor Risk Assessment	Edmonds, Glenn	In Progress	3/28/2015
Vendor Risk Assessment	External Vendor Risk Assessment	Baker, Audrey	Draft	4/3/2015
Vendor Risk Assessment	External Vendor Risk Assessment	Hohman, Christine	Draft	4/1/2015
Vendor Risk Assessment	External Vendor Risk Assessment	Welch, Jack	Draft	4/1/2015
Vendor Risk Assessment	External Vendor Risk Assessment	Edmonds, Glenn	Draft	4/1/2015
Vendor Risk Assessment	External Vendor Risk Assessment	Callahan, Chris	Draft	4/1/2015

Assessment reporting

- View a report providing summary information for assessments
- View a report from the perspective of the answers

The screenshot shows a software application window for managing vendor profiles and assessments. On the left, a sidebar navigation menu includes options like 'System Lookup Tables', 'Vendor Profiles' (with sub-options 'Add New', 'Import / Bulk Ops', 'Create Report', 'Browse'), 'Public Reports', 'Assessments' (with sub-options 'Assessments', 'Create Report', 'Public Reports' which includes 'Assessment Status By Assessment Questionnaire' and 'Assessment Status By Vendor', and 'Assessments in progress'), 'Assessment Answers' (with sub-options 'Create Report' and 'Bulk Assessments'), and 'Workflows'. The main content area displays a vendor profile for 'Computer Tech Training Center'. The profile details include: Created By: Keylight user - 2/11/2015 9:32 PM, Updated By: Keylight user - 6/30/2015 9:43 PM; ID: 1, Current Revision: 2, Workflow Stage: Default - Published; Published: 6/30/2015 9:43 PM. Below this, there are tabs for 'Vendor Profile' and 'Assessments', with 'Assessments' being active. The 'Issued Assessments' section shows one item:

NAME	TEMPLATE	ISSUED TO	STATUS	DUE DATE	CREATED
Information Security	ISO 27001-2013	Winters, Samantha	Draft	7/31/2015	6/30/2015

Below the table are navigation buttons (back, forward, first, last), a page size selector (set to 10), and a message indicating '1 items in 1 pages'.

Assessment reporting



Section summary

View record details and linkages from the View menu

A screenshot of a software interface showing a 'View' dropdown menu. The menu is divided into two sections: 'Details' and 'Reports'. The 'View' button is highlighted with a cursor icon. The 'Details' section contains links to 'Attachments (0)', 'Output (0)', and 'Findings (0)'. The 'Reports' section contains links to 'Compliance Linkages' and 'Control Audit Report'.

- Actions ▾
- View ▾

Details	
•	Attachments (0)
•	Output (0)
•	Findings (0)

Reports	
•	Compliance Linkages
•	Control Audit Report

Assessment reporting

System reports

- Project Summary Report
- Project Rollup Report
- Compliance Linkages
- Control Audit Report

The screenshot shows a software window titled "Control Audit Report". At the top, there's a toolbar with navigation icons (back, forward, search, etc.) and an "Export" button. Below the toolbar, the title "ISO- Control Audit Report" is displayed. The main content is divided into two sections: "Audits and Risk Management" and "Behavior", each containing a table of audit results.

Question #	Response	Comments	Control #	External ID	Control Name
1.	Yes		00698		Identify the risks to the organization's key roles, processes information, and technology.
2.	Yes		00698		Identify the risks to the organization's key roles, processes information, and technology.
3.	No		00698		Identify the risks to the organization's key roles, processes information, and technology.
4.	No		00698		Identify the risks to the organization's key roles, processes information, and technology.
6.	Yes		01173		Assign a probability of occurrence to natural threats, insider threats, malicious threats, and other threat events.

Question #	Response	Comments	Control #	External ID	Control Name
7.	Yes		00815		Disseminate and communicate policies and procedures throughout the organization.



Keylight® Fundamentals

Reporting

Objectives

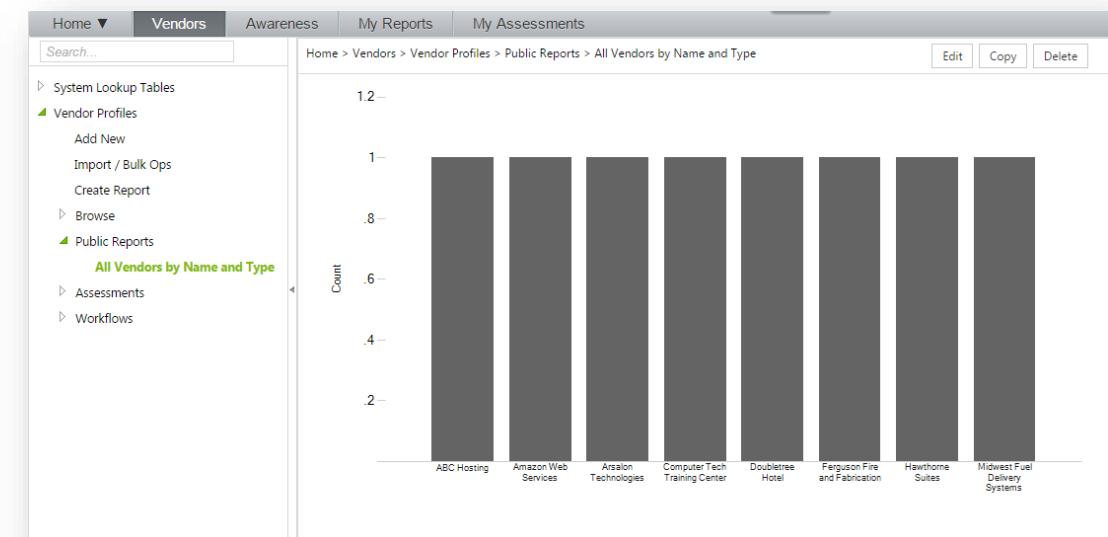
- Identify reporting options
- Create custom reports as personal and shared reports
- Modify existing reports
- Understand bulk operations with reporting

Report types

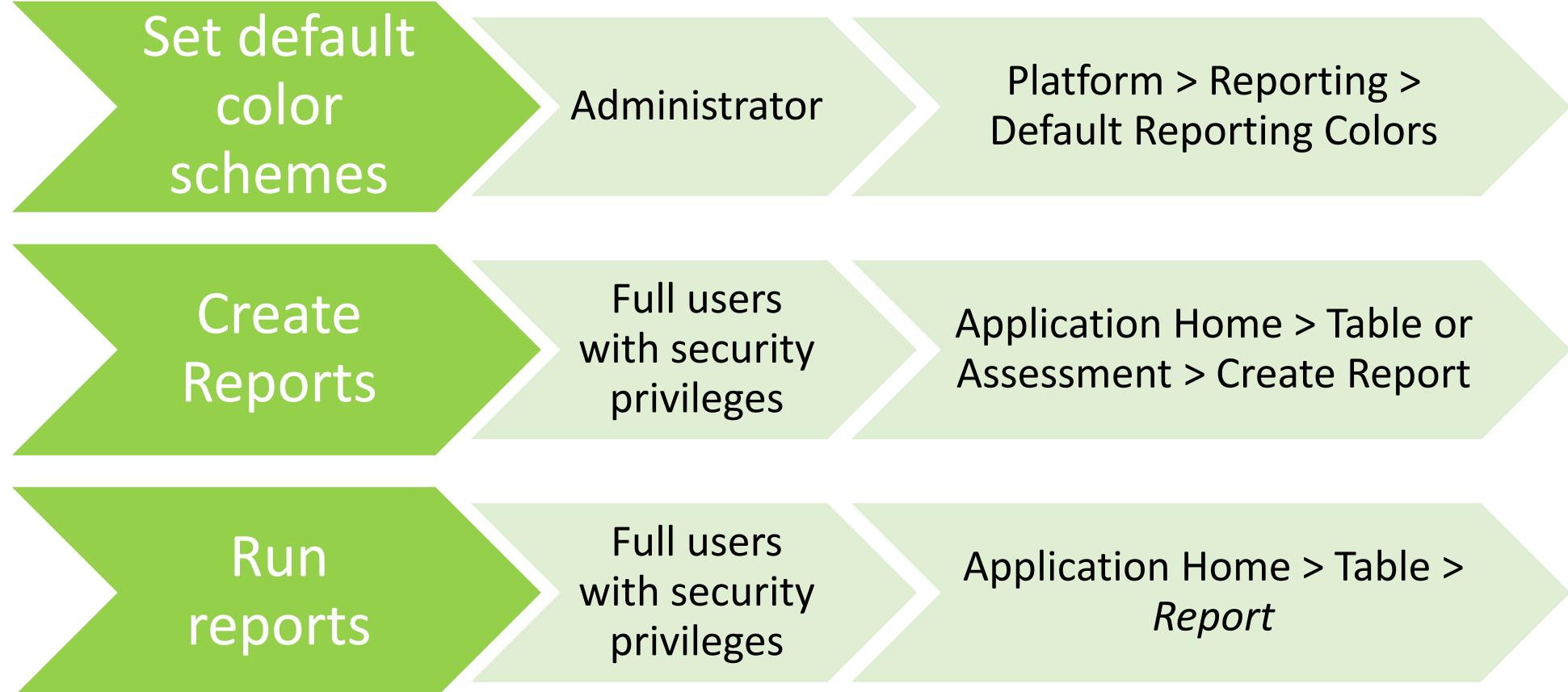
System Reports

The screenshot shows the Lockpath Keylight interface for system reports. At the top, there's a navigation bar with tabs for Home, Compliance Docs, Controls, Authority Docs, Awareness, Assessments, Functional Roles, My Reports, and My Assessments. Below the navigation bar, there's a search bar labeled "Search All..." and a user profile icon. On the left, a sidebar menu includes "Controls" (with options like Add New, Import / Bulk Ops, Create Report, Browse, Workflows) and "System Lookup Tables". The main content area has two sections: "Click the link below to create a new control." with a "Create Controls" button, and "Reports:" with links to various reports: Active Controls - Authority Documents Crosstab, Active Controls - Business Units Crosstab, Control Distribution by Business Unit Report, Control Popularity by Business Unit Report, and Functional Roles Report - Active Controls.

Custom Reports



Getting around



**Full users can run system reports with the proper security privileges*

Reporting sources and creators

Reporting sources

- Tables
- Assessments
- Assessment answers



Report creators

- A user can create personal reports
- An administrator can create personal and system reports



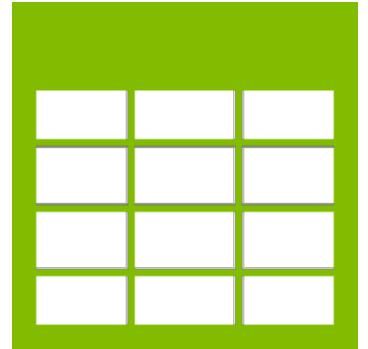
Reporting Creation

Creating custom reports

The screenshot shows a software interface for creating custom reports. On the left, a sidebar menu under 'ACME Devices' includes options like 'Add New', 'Import / Bulk Ops', 'Create Report' (which is highlighted in green), 'Browse', 'Workflows', 'Device Types', and 'Devices'. The main area has tabs for 'Fields', 'Report Options' (which is selected and highlighted in blue), 'Filters', 'Sharing', and 'Colors'. In the 'Report Options' tab, there is a search bar 'Enter Name', dropdowns for 'Report Type: Grid' (selected) and 'Data Source: ACME Devices', and radio buttons for 'Merge Sub-Grids (BETA)' (set to 'No') and 'Versioned' (set to 'No'). A large grid table displays device data with columns 'DEVICE NAME', 'ACQUISITION DATE', and 'DEVICE LOCATION'. The table contains five rows of data: 'IBM Application Server' (7/1/2013, OPKS), 'Lenovo Laptop' (10/14/2015, OPKS), 'Lenovo ThinkPad' (10/14/2015, Overland Park, KS), and two entries for 'Lenovo ThinkPad' (5/15/2014, OPKS). Navigation controls at the bottom of the grid include page numbers (1-15 of 15) and arrows.

DEVICE NAME	ACQUISITION DATE	DEVICE LOCATION
IBM Application Server	7/1/2013	OPKS
Lenovo Laptop	10/14/2015	OPKS
Lenovo ThinkPad	10/14/2015	Overland Park, KS
Lenovo ThinkPad	5/15/2014	OPKS

Creating reports



Report tabs for a Grid Report

- Available Fields
 - Including Related Tables
- Report Options
- Filters
- Sharing
- Colors

The screenshot displays a software interface for creating reports. On the left, a sidebar titled 'Fields' lists various data points categorized under 'ACME Devices', such as Acquisition Cost, Acquisition Date, Asset Tag, Assigned Date, Assigned To, Blankhelperdate, Contract Expiration Date, Created At, Created By, Current Revision, Date Returned to In-Serv, and Device End of Life Date. The main workspace is titled 'Report Options' and contains several tabs: Report Options, Filters, Sharing, and Colors. Under 'Report Options', there is a search bar labeled 'Enter Name', a dropdown for 'Report Type' set to 'Grid', a dropdown for 'Data Source' set to 'ACME Devices', and a section for 'Merge Sub-Grids (BETA)' with radio buttons for 'Yes' and 'No'. Below these settings is a preview grid titled 'Grid' showing four rows of data:

DEVICE NAME	ACQUISITION DATE	DEVICE LOCATION
IBM Application Server	7/1/2013	OPKS
Lenovo Laptop	10/14/2015	OPKS
Lenovo ThinkPad	10/14/2015	Overland Park, KS

At the bottom of the grid, there are navigation buttons for page numbers (1, 2, 3, etc.) and a 'Page Size' dropdown set to 20. A status bar at the bottom right indicates '1 - 15 of 15'.

*When exporting a report, flatten the report (Merge Sub-Grids) so that all data is presented.

Creating reports



Report tabs for a Chart Report

- Available Fields
 - Including Related Tables
- Report Options
- Filters
- Sharing
- **Grouping**
- Colors
- Legend
- **Chart Options**

The screenshot shows the 'Create Report' screen in the LockPath software. The top navigation bar includes 'Home', 'Vendors' (which is the active tab), 'Awareness', 'My Reports', and 'My Assessments'. Below the navigation is a breadcrumb trail: 'Home > Vendors > Vendor Profiles > Assessments > My Reports > Create Report'. On the right side of the screen are 'Save' and 'Cancel' buttons. The main area is titled 'Enter Name' and contains a dropdown menu for 'Report Type' set to 'Bar (Vertical)' and a color palette. To the left is a 'Fields' sidebar listing various vendor profile fields: Address Line 1, Address Line 2, City, Contract Type, Created At, Created By, Current Revision, and Description. At the bottom of the screen are 'Chart' and 'Grid' tabs, with the 'Chart' tab currently selected.

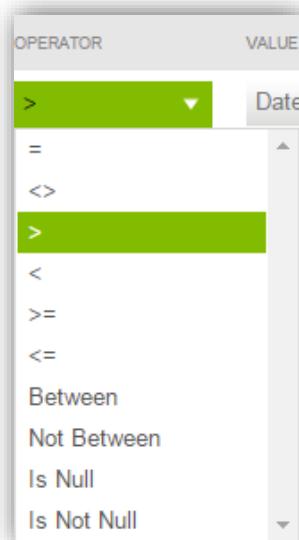
Filtering example

Filter for including only records created after a certain date:

Field = Created At

Operator = > (greater than)

Value = Desired date



Before applying filter

CREATED BY: FULL NAME	RISK SCORE	TITLE	COMPLIANCE DOCUMENT: TITLE	REQUESTED END DATE
Hohman, Christine	Low	Emergency approval for signing authority	Accounting Policies	5/7/2015
Callahan, Chris	Low	Emergency vendor approval for diesel supplier	Third Party Services	4/17/2015
Rincon, Troy	Low	Expense Restriction Accommodation	Accounting Policies	8/14/2015
Hohman, Christine	Low	Password Exception	Password Guidelines	12/31/2015
Callahan, Chris	Low	Terminated employee requires system access	Acceptable Use	4/17/2015
Hohman, Christine	Low	Vendor on-boarding	Third Party Services	5/29/2015

After applying filter

NAME	OPERATOR	VALUE		
Created At	>	07/01/2015 12:00 AM		
<hr/>				
CREATED BY: FULL NAME	RISK SCORE	TITLE	COMPLIANCE DOCUMENT: TITLE	REQUESTED END DATE
Rincon, Troy	Low	Expense Restriction Accommodation	Accounting Policies	8/14/2015
Hohman, Christine	Low	Password Exception	Password Guidelines	12/31/2015

Reporting options

Sharing tab

General Access

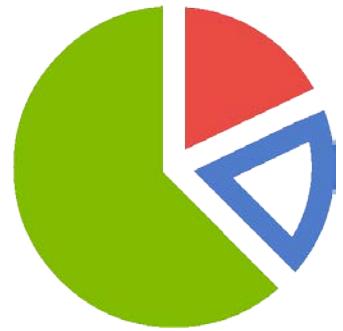
- Personal
- Shared

Administrative Access

- Global
- Navigation Tree

The screenshot shows a software interface for managing sharing options. At the top, there are four tabs: Report Options, Filters, Sharing (which is selected and highlighted in dark grey), and Colors. Below the tabs, there are two main sections. The left section, titled 'Report Options', contains a radio button group for 'Personal' (unselected), 'Shared' (selected and highlighted in blue), 'Global' (unselected), and 'Navigation Tree' (unselected). To the right of this is a search bar labeled 'Enter a Group name' with a dropdown arrow icon. Below the search bar is a section titled 'GROUPS' with a message 'No records to display.' The right section contains two search bars: one for 'Enter a User name' and another for 'EMAIL'. Both of these sections also have a message 'No records to display.' at the bottom. On the far right of the interface, there are three small icons: a magnifying glass, a person icon, and a document icon.

Reporting options



Colors tab

Grid Text and Chart Fill Color

Predefined

Label	Chart Fill Color	Grid Text Color	Color assignments:
Critical	Dark Purple	Critical	<input checked="" type="radio"/> Predefined <input type="radio"/> Custom
High	Red	High	
Medium	Orange	Medium	
Low	Yellow	Low	
Informational	Green	Informational	

Custom

+ Add				
Label	Chart Fill Color	Grid Text Color		
CAAN-1	Pink	CAAN-1		
GAAT-1	Blue	GAAT-1		

Reporting options



Grouping tab

- Fields
- Limit Results
- Aggregate Function
- Sort By

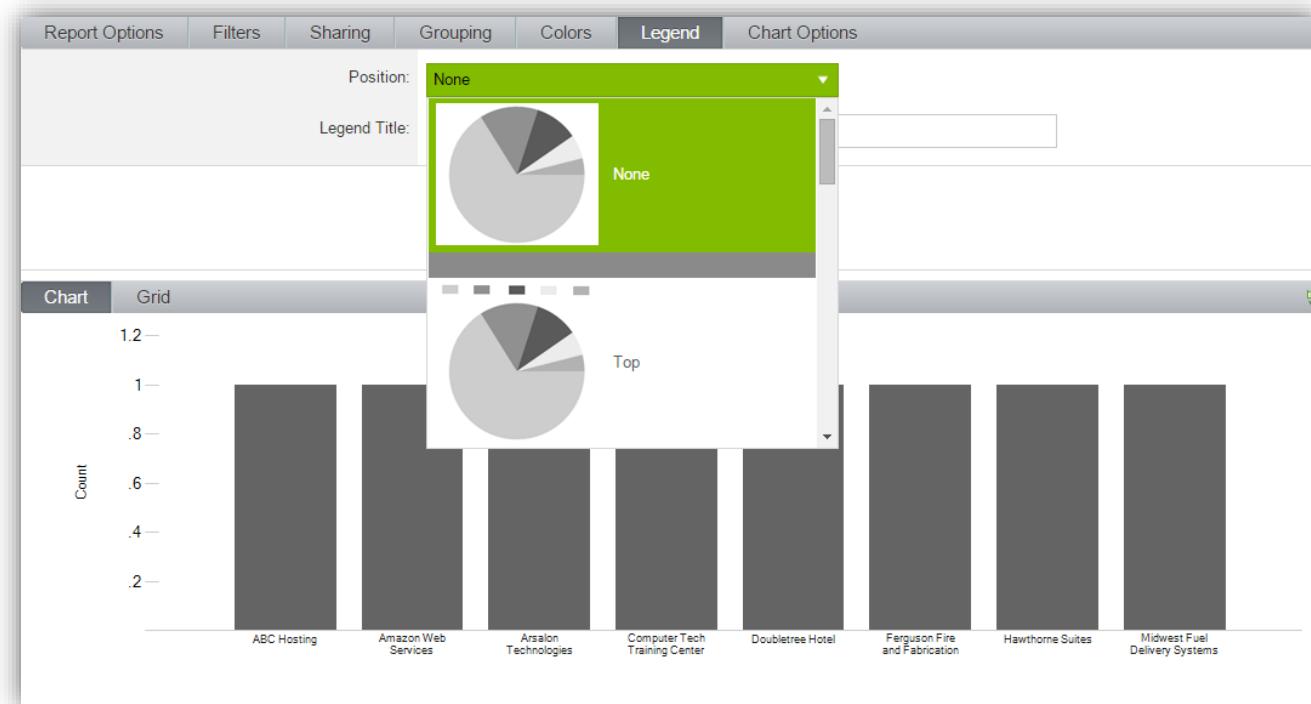
The screenshot shows the LockPath reporting interface with the 'Grouping' tab selected. On the left, there's a list of grouping criteria with edit icons: 'Assigned Date' (operator: Date) and 'Device Location'. To the right, there are several configuration options:

- Limit Results:** A section with a radio button for 'No' (selected), a radio button for 'Yes', and a dropdown set to '25'.
- Aggregate Function:** A dropdown menu currently set to 'Count'.
- Sort By:** A dropdown menu currently set to 'Label Ascending'.

Reporting options

Legend tab

- Position
- Legend Title



Reporting options

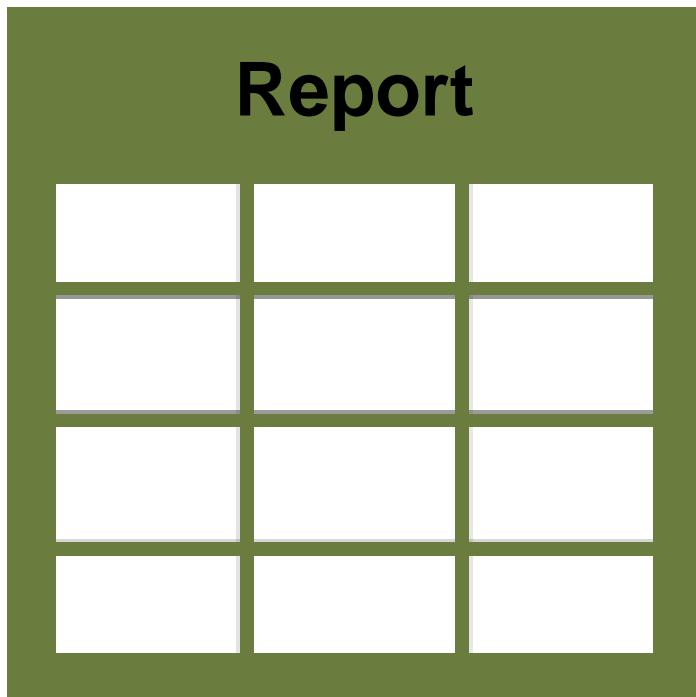
Chart Options tab

- Labels
- X-Axis Title
- Y-Axis Title
- 3D
- Series Mode

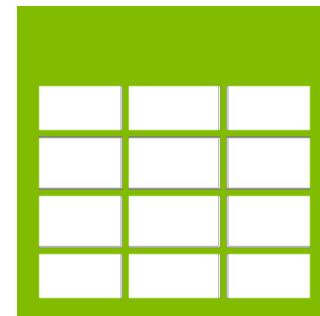


Modifying reports

After saving, you can Edit, Delete or Copy a report.



Edit



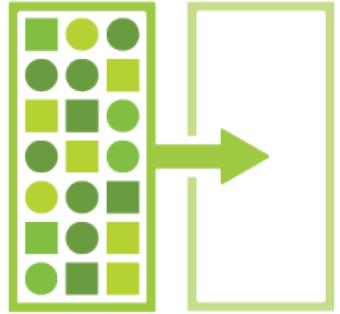
Copy



Delete

Bulk operations

Edit, move, edit and move, or delete multiple records at the same time



The screenshot shows a software application window titled "Home > Exceptions > Exception Requests > Public Reports > Exceptions Analysis 2014 - grid". On the left, there's a navigation sidebar with "Exception Requests" expanded, showing "Add New", "Import / Bulk Ops", "Create Report", "Public Reports" (expanded), "90 Day Exception Report", "Compliance Document Exceptions", "Exceptions Analysis 2014 - grid" (highlighted in green), "Exceptions By Compliance Doc", and "Exceptions By Severity". The main area displays a grid of exception records. A context menu is open over the first record, with options: "+ Add...", "Bulk...", "Edit", "Move", "Edit/Move", and "Delete". The "Bulk..." option is highlighted. The records listed are: "CEO Want:", "Critical Vulns cannot be patched", "Data center Mainframe Password Exception", "Emergency Request - Onboard Vendor today", and "Google Apps data may share anonymous data".



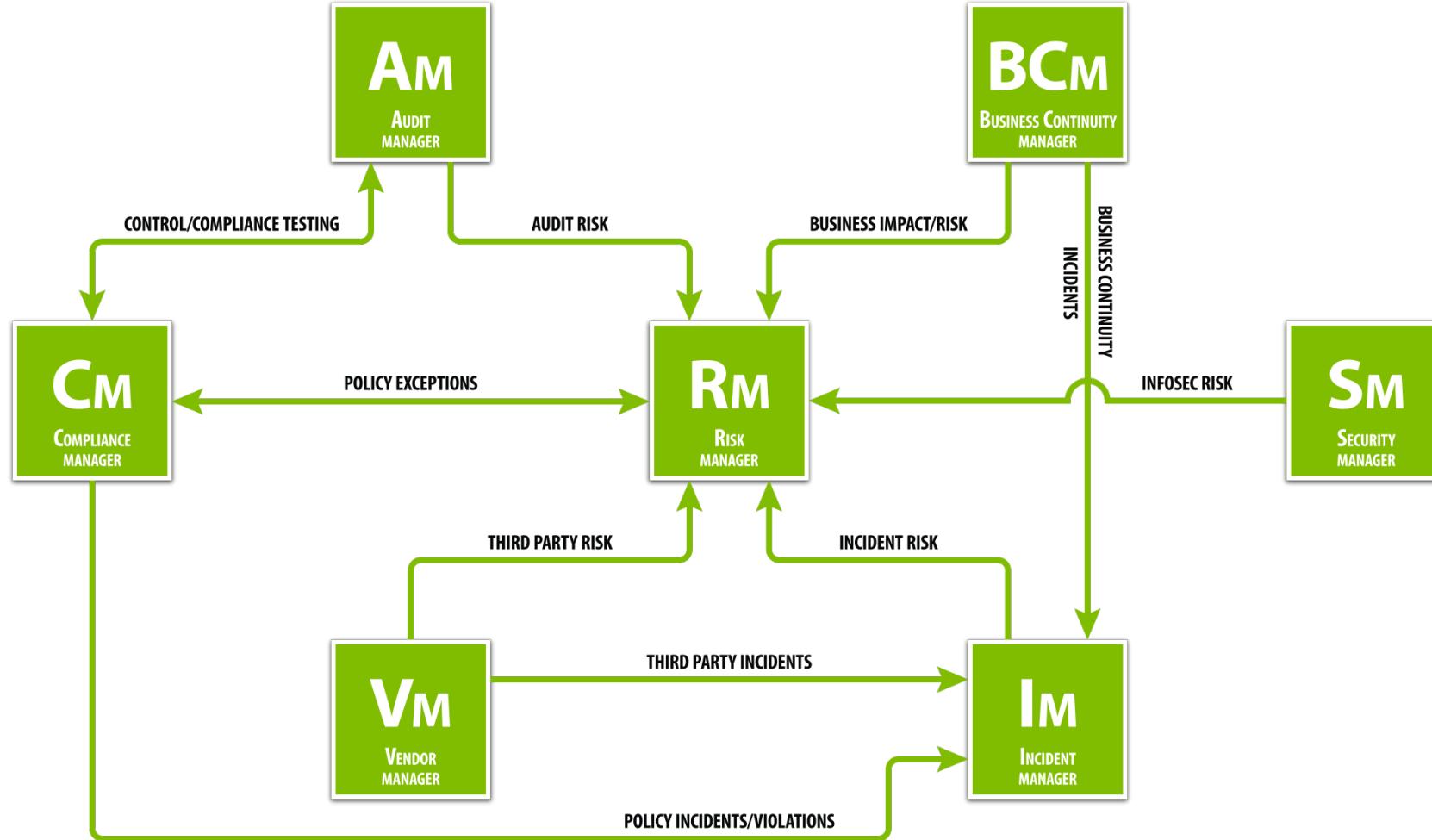
Keylight® Fundamentals

Dashboards

Objectives

- Present report data on a dashboard
- Identify dashboard and portlets types
- Create a personal and system dashboard

Keylight Ecosystem

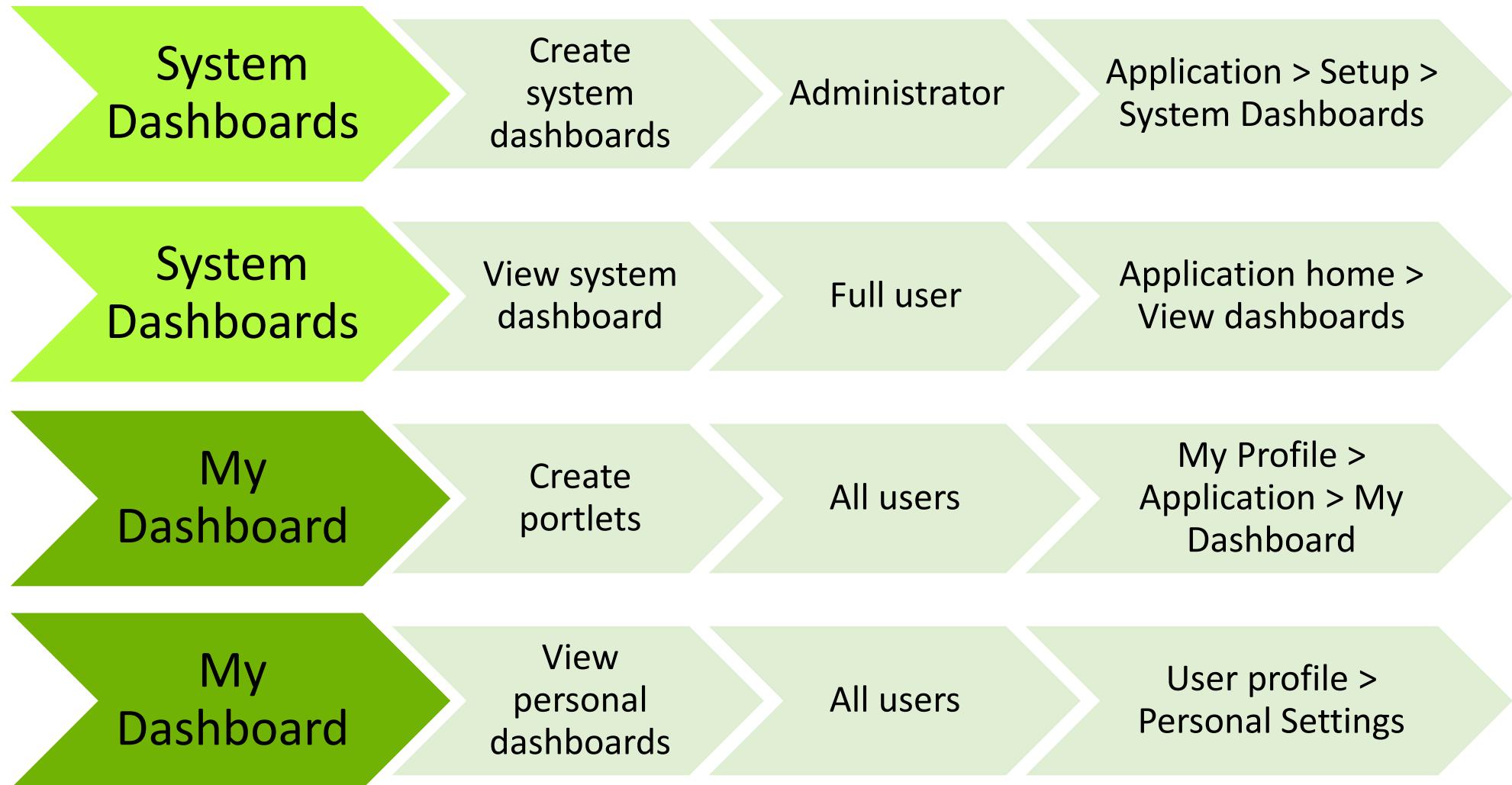


Keywords

Term	Description
Portlet	An individual pane on a dashboard.
My Dashboard	A dashboard visible only to the user who created it.
System Dashboard	A universal dashboard visible to Full users in Keylight.

Dashboard Basics

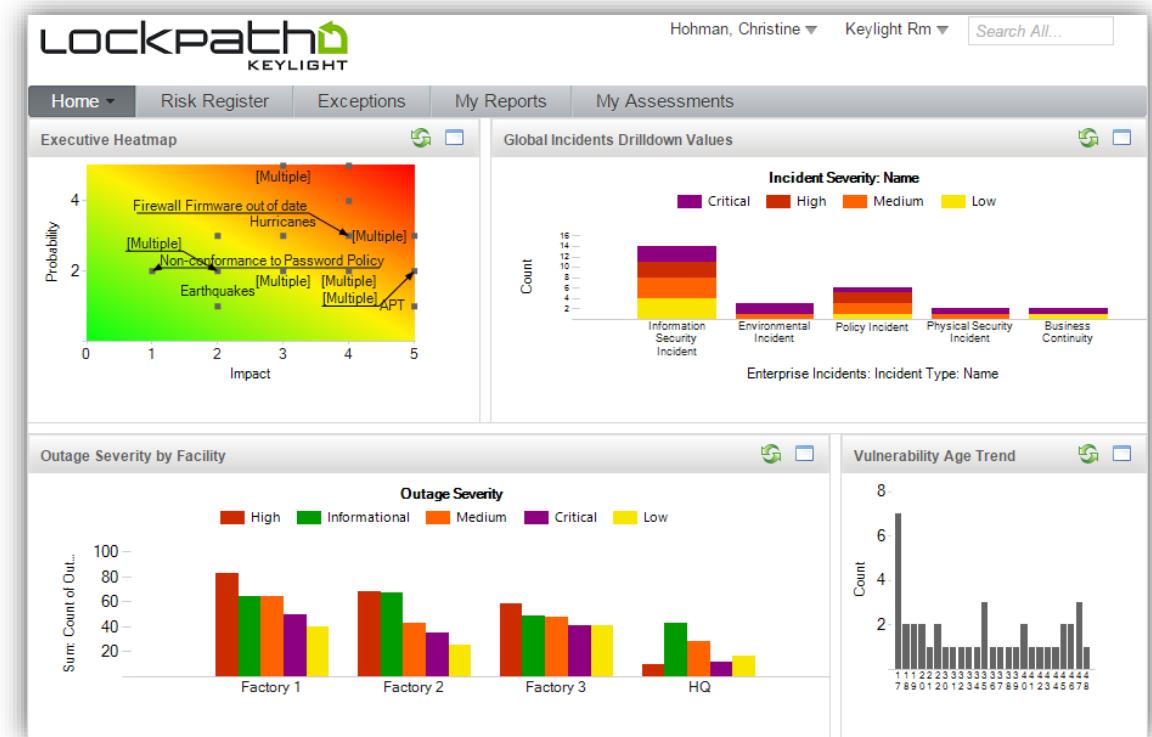
Getting around



Dashboard types

Every application has dashboards

- Dashboard types:
 - System
 - *Administrative users manage system dashboards*
 - Personal
 - *Users manage personal dashboards (My Dashboard)*



Permissions

You must have permissions at the security role and workflow stage

Proper permissions

The screenshot shows the Lockpath Risk Team Dashboard. At the top, there is a navigation bar with links for Home, Risk Register, Exceptions, My Reports, and My Assessments. The user is identified as Hohman, Christine with a dropdown for Keylight Rm and a search bar. Below the navigation, a message says "Welcome to the Risk Team Dashboard." A note states: "On the Risk Dashboard you will see current data on risks, exceptions, incidents. You can click on any chart within the dashboard to drill into information." Three numbered items are listed: 1) Global risks heatmap, 2) Global Incidents by type, 3) Audit Findings. A link "Scroll down to view all reports in the dashboard." is provided. The dashboard features three main charts: a donut chart titled "Control Compliance Doc Gap Analysis" with segments for "Unmapped" and "Mapped"; a bar chart titled "Compliance Docs by Stage" showing counts for Content Authoring, Grammatical Review, Final Review and Signoff, and Published; and a bar chart titled "Audit Project Tasks" showing tasks for 2015 User Access Audit and pci dss 2.0. A legend on the right lists categories: Template, Standard, Procedure, Policy, Plan, Framework, and Checklist.

Improper permissions

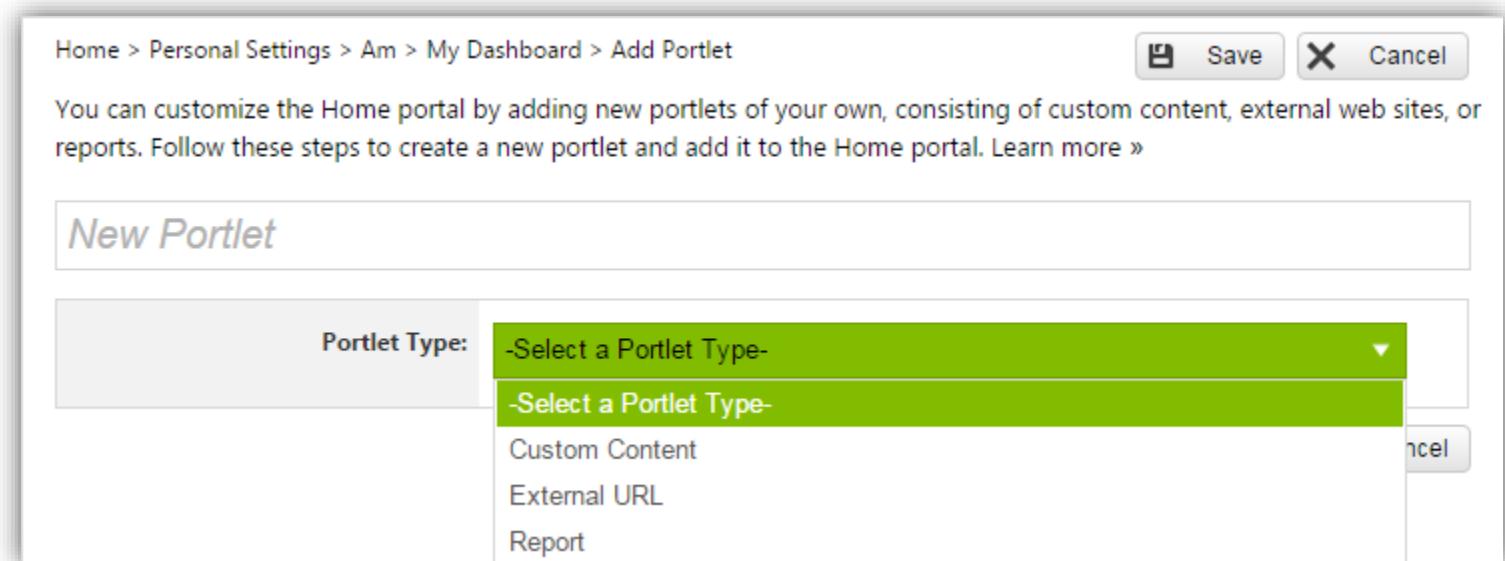
The screenshot shows the Lockpath Risk Team Dashboard under "User, Full" permissions. The layout is identical to the proper permissions screenshot, including the navigation bar, user info, and dashboard message. The numbered items 1) through 3) are also present. However, the bottom section of the dashboard is now a large orange "Access Denied" banner with a padlock icon, indicating that the user lacks the necessary permissions to view the detailed reports.

Custom dashboards

Customize a dashboard by adding new portlets:

Portlet types

- Custom content
- External web sites
- Reports



System Dashboards

System dashboard setup

- System Dashboards option is available in all applications
- Permissions control access to each dashboard

The screenshot shows the Lockpath Keylight application interface. The top navigation bar includes links for AM, BCM, CM, IM, RM, SM, VM, user management (3 users), and a search bar. The left sidebar has a tree view with nodes like Keylight Platform, Keylight Am, Keylight BCM, Keylight Cm (which is expanded to show Assessments, Authority Docs, Awareness, Compliance Docs, Controls, and System Dashboards), System Tabs, and UCF Updates. The main content area displays a list of dashboards under "Home > Setup > Cm > Dashboards". The table has columns for NAME, DEFAULT, GROUPS, and USERS. It lists two dashboards: "Compliance Team Dashboard" (Default, Everyone) and "Governance, Risk, Compliance Oversight Team" (Default, Everyone). Both rows have a trash can icon in the last column.

NAME	DEFAULT	GROUPS	USERS
Compliance Team Dashboard		Everyone	
Governance, Risk, Compliance Oversight Team		Everyone	

You can create multiple system dashboards in each application

System dashboard creation

- A system dashboard can be set as the default dashboard
- Each dashboard has assigned groups and users

The screenshot shows a software interface for creating a new system dashboard. On the left, there is a sidebar menu with the following items:

- Keyleight Platform
- Keyleight Am
- Keyleight BCm
- Keyleight Cm
- Keyleight Im
- Keyleight Rm
- Keyleight Sm
- Keyleight Vm (selected)
- Awareness
 - General Settings
 - Pending Reminders
- Email Templates
- Security Settings
- System Dashboards** (highlighted in green)
- System Tabs
- Vendors Tables

The main panel is titled "Home > Setup > Vm > System Dashboards > Create Dashboard > Edit". It contains fields for "Dashboard Name" (placeholder: "[Type Dashboard Name]"), "Default" (radio buttons for Yes or No, with "No" selected), "Groups" (text input field: "Enter a Group name" with a search icon), and "Users" (text input field: "Enter a User name" with a search icon). Both the "Groups" and "Users" sections show a message: "No records to display." At the bottom right are "Save" and "Cancel" buttons.

Portlets and sections

- Add Portlets
 - Custom Content
 - External URL
 - Report
- Add Sections
- Drag and Drop sections from Available Portlet (Not Visible) to arrange portlets in the dashboard

Home > Setup > Vm > System Dashboards > Past Due Vendor Assessments Edit

Past Due Vendor Assessments

Use this page to customize the system dashboard configuration. The system dashboard is a universal dashboard visible to all Keylight users. Drag available portlets into one of the sections below. Each section represents a row within the dashboard. Click **Add Portlet...** to create a new custom portlet. Click **Add section** to add a new row to the dashboard. Click **Edit** to change whether the dashboard is a default dashboard. The default dashboard displays when users log into Keylight, as opposed to their personal dashboard. In cases where multiple dashboards exist, the most recent dashboard the user was viewing is displayed.

Name:	Past Due Vendor Assessments
Default:	Yes
Groups:	Everyone
Users:	

+ Add Portlet... + Add Section ⓘ

SECTION/PORTLET	TYPE
Section 1	
Available Portlets (Not Visible)	
All Vendors by Name and Type	Reportlet
Assessment Status by Assessment Questionnaire	Reportlet
Assessment Status by Vendor	Reportlet
Compliance Docs by Stage	System Content
Control Compliance Doc Gap Analysis	System Content
Login History	System Content
My Acknowledged Compliance Documents	System Content
My Compliance Document Tasks	System Content
Overall Awareness	System Content

Custom Content portlet

Enables you to create the content that you want to display in the portlet

Home > Setup > Vm > System Dashboards > Past Due Vendor Assessments > Add Portlet Save Cancel

You can customize the Home portal by adding new portlets of your own, consisting of custom content, external web sites, or reports. Follow these steps to create a new portlet and add it to the Home portal. [Learn more »](#)

New Portlet

Portlet Type: **Custom Content**

Content:

Design HTML

External URL portlet

Type the **URL** for the web site you want to appear in the portlet.

Some web sites may not be able to be displayed in a portlet because of security specifications from the site.

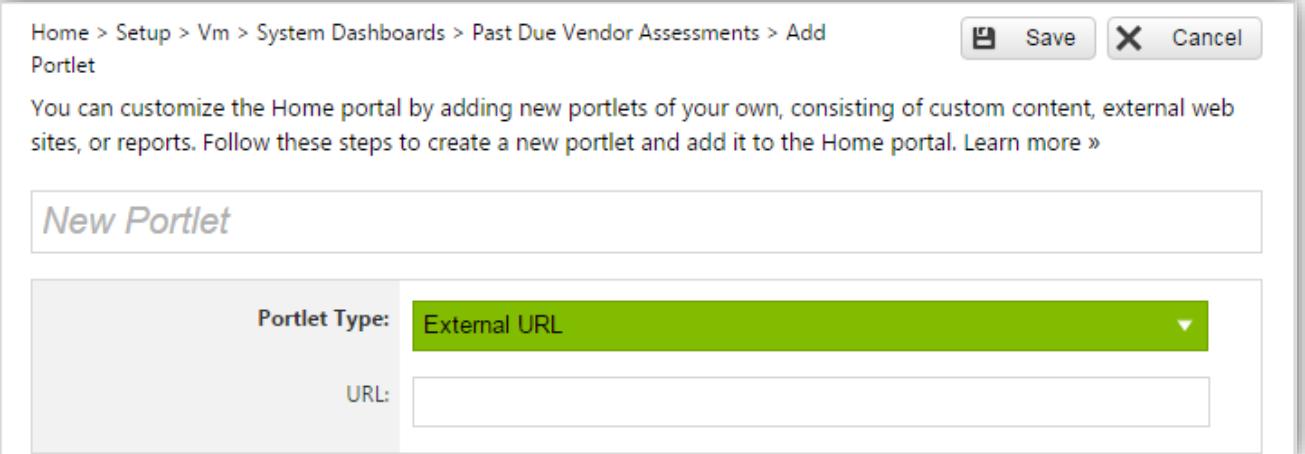
Home > Setup > Vm > System Dashboards > Past Due Vendor Assessments > Add Portlet Save Cancel

You can customize the Home portal by adding new portlets of your own, consisting of custom content, external web sites, or reports. Follow these steps to create a new portlet and add it to the Home portal. [Learn more »](#)

New Portlet

Portlet Type: **External URL** ▾

URL:



Report portlet

Only public reports and reports to which the user has permissions can be added to a report portlet

Home > Setup > Vm > System Dashboards > Past Due Vendor Assessments > Add Portlet Save Cancel

You can customize the Home portal by adding new portlets of your own, consisting of custom content, external web sites, or reports. Follow these steps to create a new portlet and add it to the Home portal. [Learn more »](#)

New Portlet

Portlet Type: Report

Report:

- ▷ Assessments
- ▷ Audit Projects
- ▷ Audit Tasks
- ▷ Audit Universe
- ▷ Authority Doc Citations
- ▷ Authority Documents
- ▷ Business Continuity Plans
- ▷ Controls
- ▷ Devices
- ▷ Exception Requests
- ▷ Incident Reports
- ▷ Risks
- ▷ Tabletop BCP Exercises
- ▷ Vendor Profiles
- ▷ Vulnerability Findings

Dashboard example

This dashboard contains a Custom Content portlet and various Report portlets

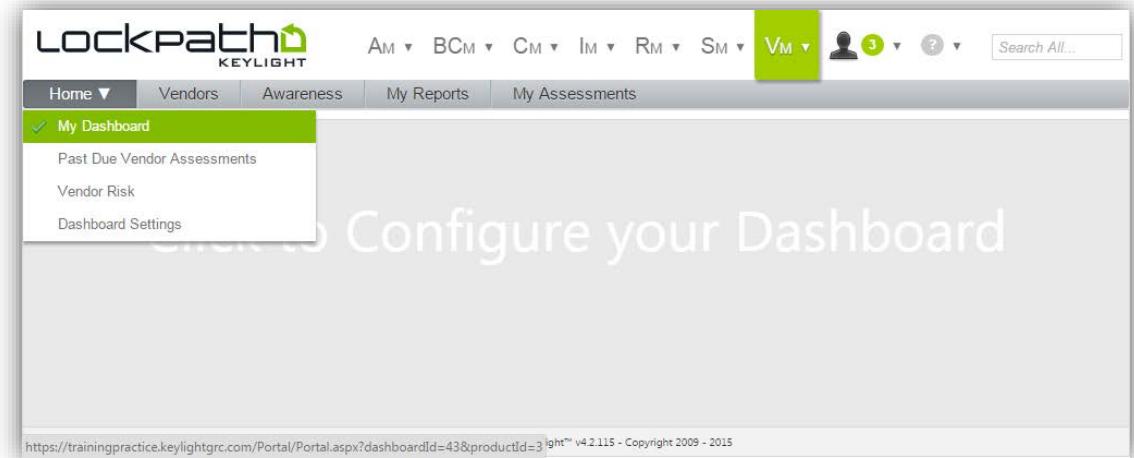
The screenshot shows the Lockpath Keylight Risk Team Dashboard. At the top, there is a header with the Lockpath logo, user information (Hohman, Christine and Keylight Rm), and a search bar. Below the header is a navigation bar with links to Home, Risk Register, Exceptions, My Reports, and My Assessments. The main content area is titled "Risk Team Dashboard" and includes a welcome message and instructions for using the dashboard. It features three report portlets: "Control Compliance Doc Gap" (with a circular progress bar and text "Unmap... Mapp..."), "Compliance Docs by Stage" (a bar chart showing document counts across stages: Content Authoring, Grammatical Review, Final Review and Signoff, Published), and "Audit Project Tasks" (a list showing an audit project for "2015 User Access Audit" with tasks for "pci dss 2.0"). A legend on the right side of the dashboard defines the colors for different document types: Template (light green), Standard (dark green), Procedure (medium green), Policy (dark grey), Plan (light grey), Framework (medium green), and Checklist (dark grey).

Stage	Template	Standard	Procedure	Policy	Plan	Framework	Checklist
Content Authoring	~2.5	~0.8	~0.2	~0.1	~0.1	~0.1	~0.1
Grammatical Review	~1.8	~0.8	~0.2	~0.1	~0.1	~0.1	~0.1
Final Review and Signoff	~0.8	~0.8	~0.2	~0.1	~0.1	~0.1	~0.1
Published	~0.8	~1.0	~0.2	~0.1	~0.1	~0.1	~0.1

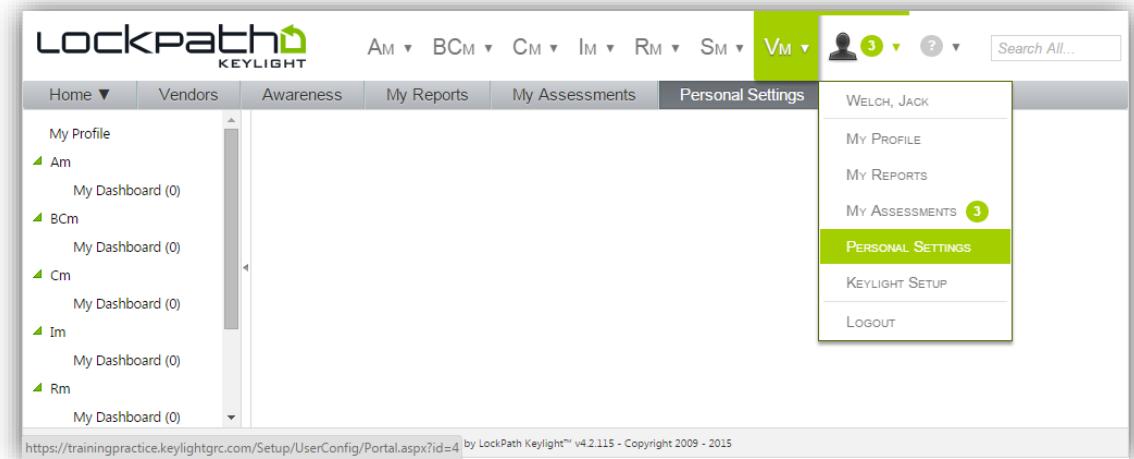
Personal Dashboards

My Dashboard setup

Access through Home tab of any application



Access through Personal Settings



My Dashboard creation

- Add Portlet
 - Custom Content
 - External URL
 - Report
- Add Section
- Drag and Drop sections to arrange portlets

My Dashboard

Use this page to customize your dashboard configuration. Drag available portlets into one of the sections. Each section represents a new row within the dashboard. When you have finished configuring your dashboard, from the Keylight menu in the upper-right corner, click "Home" to return to the dashboard page.

+ Add Portlet...		+ Add Section
SECTION/PORTLET	TYPE	
Section 1		
Compliance Task List	Custom Content	
LockPath	External URL	
Section 2		
Active Authority Documents	Reportlet	
Compliance Docs by Stage	System Content	
Available Portlets (Not Visible)		
Control Compliance Doc Gap Analysis	System Content	
Login History	System Content	
My Acknowledged Compliance Documents	System Content	
My Compliance Document Tasks	System Content	
Overall Awareness	System Content	

My Dashboard example

This personal dashboard shows a Custom Content portlet, a External URL portlet, and various Report portlets.

The screenshot displays a personalized dashboard interface with the following components:

- Top Navigation Bar:** Home, Compliance Docs, Controls, Authority Docs, Awareness, Assessments, Functional Roles, My Reports.
- Compliance Task List Portlet:** A list of compliance tasks:
 - Review Acceptable use policy.
 - Once policy is reviewed, send annual awareness event.
 - Create new strong password policy.
- External URL Portlet:** A banner from LockPath titled "How Keylight saved a client \$3.5 million". It states: "Using Keylight's Conflict Minerals Solution, Fossil Inc. completed the complex reporting requirements of Dodd-Frank and avoided spending millions of dollars and adding dozens of staff."
- Report Portlets:**
 - Active:** A table view showing the following row:

TITLE	DESCRIPTION	REFERENCE	EXTERNAL ID	RELEASE DATE	APPLICABILITY/ ORIGINATOR
NUMBER					
45 CFR Part 164	US Department of Health and Human	0000987	02/11/2013	US Department of Health and Human Services	
 - Compliance Docs by Stage:** A stacked bar chart showing the count of documents at different stages: Signoff (dark green) and Published (medium green). The Y-axis ranges from 0 to 2.5.

Modifying personal dashboards

Use the Dashboard Settings option from the Home tab to edit a personal dashboard.

The screenshot shows the Lockpath Keylight web application interface. At the top, there is a navigation bar with tabs: Home, Vendors, Awareness, My Reports, My Assessments, Personal Settings, and a dropdown menu for VM. The VM dropdown is highlighted with a green box. On the far right of the header, there is a user icon with a '3' notification badge and a search bar labeled 'Search All...'. Below the header, the main content area has a breadcrumb trail: Personal Settings > VM > My Dashboard. The left sidebar contains a tree view of dashboard sections: 'My Dashboard' (selected), 'Cm' (with 'My Dashboard (0)'), 'Im' (with 'My Dashboard (0)'), 'Rm' (with 'My Dashboard (0)'). The main panel shows a configuration interface for 'My Dashboard'. It includes a title 'Dashboard' and a descriptive text about customizing the dashboard. A 'Dashboard Settings' section is highlighted with a green box. Below it is a table titled 'Available Portlets (Not Visible)' which lists 'Compliance Docs by Stage' under the 'System Content' category. There are also buttons for '+ Add Portlet...' and '+ Add Section'. The URL at the bottom of the page is <https://trainingpractice.keylightgrc.com/Setup/UserConfig/Portal.aspx?productId=3&id=1>.

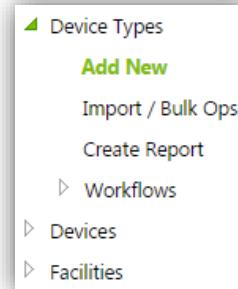
Create a Record

1. Hover over desired application and select an item from the menu.



2. From the tree pane on the left, expand the application to which you want to create a new record.
3. Click Add New.
4. Complete the desired fields with data and click Save.

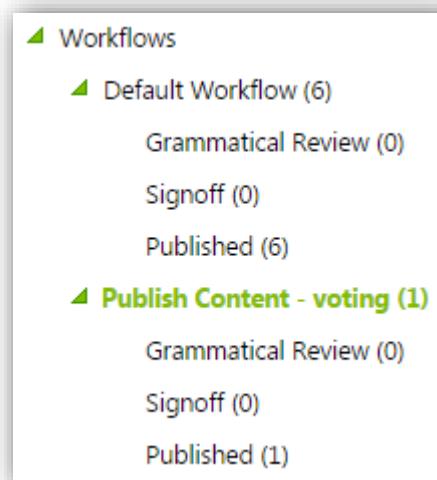
- Bold titles are required fields.
- Additional information is accessed by tabs that may appear across the top.



The screenshot shows a 'New Record' dialog box for 'Authority Documents'. At the top, there are 'Save' and 'Cancel' buttons. Below them is a 'Title:' input field with a mandatory indicator. The 'Info' tab is selected in the tab bar. Underneath, there are several form fields: 'Active' (radio buttons for Yes, No, No Value), 'Business Units' (a dropdown menu with a placeholder 'Type to select an item...'), 'NAME' (a list box showing 'No records to display.'), and 'Document Type' (a dropdown menu).

Access Workflow

1. Hover over desired application and select an item from the menu.
2. From the tree pane on the left, expand the table you want.
3. Expand the desired workflow.



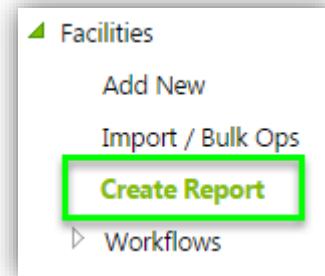
Edit Records

1. After you access a record, whether through workflow or a report, you can perform activities by using the buttons at the top right.
2. Do any of the following:
 - Click Edit to update the record.
 - Click Actions to advance the record to the next stage of the workflow.

The screenshot shows the Lockpath Keylight application interface. At the top, there is a navigation bar with tabs: Home, Assets (highlighted in blue), Configs, Vulnerabilities, Web Apps, Research, My Reports, and My Assessments. Below the navigation bar is a search bar labeled "Search All...". The main content area shows a breadcrumb path: Home > Assets > ACME Devices > HP 2500. On the left, there is a sidebar with a tree view of assets, including "ACME Devices" (with options like "Add New", "Import / Bulk Ops", "Create Report", "Browse", and "Workflows" which is expanded to show "ACME Device Inventory (15)", "Procurement (2)" (highlighted with a green box), "Assignment (2)", "In-Service (7)", "Out-of-Service (1)", and "End-of-Life (3)"), "Device Types", "Devices", "Facilities", and "System Lookup Tables". The central area displays "HP 2500" device information. A modal window is open over the device details, showing "Device Information" and "Assignment" tabs. The "Assignment" tab contains fields for "Device Type" (Desktop), "Serial Number" (HP897DSK354XYZ8), "Acquisition Date" (10/14/2015), "Device End of Life Date" (10/14/2018), "Repaired or Expired", and "Date Returned to In-Service". To the right of the device details, there is a sidebar with sections for "Authoring" (Edit, Lock, Delete), "Workflows" (Advance to Assignment, Workflow Owner: Send To, Assignment, In-Service, Out-of-Service, End-of-Life, Reassign workflow), "Share" (Link), and "Leased" (No). At the bottom of the modal, it says "Powered by LockPath Keylight™ v4.2.119.1 - Copyright 2009 - 2015".

Create a Grid Report

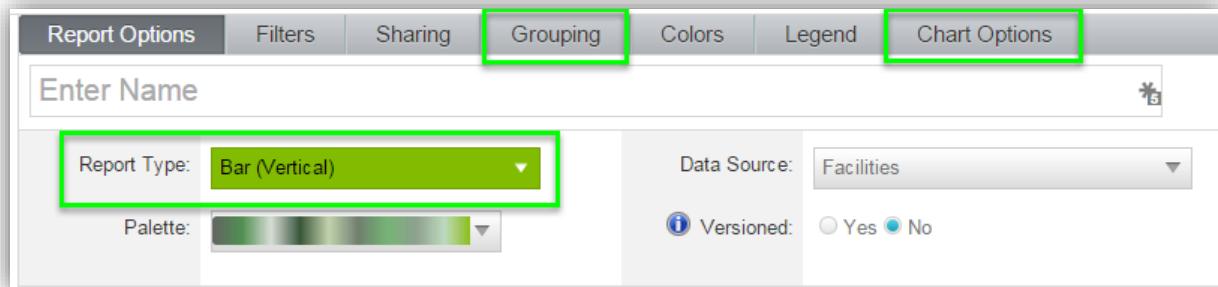
1. Select the application that contains the table on which you want to find data.
2. Click the table that contains the data and click Create Report.
3. To adjust a report, do the following:
 - a. Name the report.
 - b. From the Fields list, drag the fields that you want in the report.
 - c. Click and drag Column Headings to change the order in which data is presented. Each column can also sort its results.
 - d. Add filters, sharing options and colors from the tabs across the top.

A screenshot of the 'Create Report' dialog. The left sidebar shows a list of fields: Address Line 1, Address Line 2, City, Created At, Created By, Current Revision, Id, Name, Published Revision, State, and Updated At. The 'Fields' tab is selected. The main area has tabs for 'Report Options', 'Filters', 'Sharing', and 'Colors', with 'Report Options' currently active. It shows settings for 'Enter Name', 'Report Type: Grid', 'Data Source: Facilities', and 'Versioned: Yes'. Below this is a 'Grid' section with a table showing two rows of facility data.

NAME	ADDRESS LINE 1	ADDRESS LINE 2	CITY	STATE	ZIP CODE
CAAN-1	22 Business Park Ln	Bldg 1	Anaheim	CA	92803
CALA-P1	100 Elysian Park Ave		Los Angeles	CA	90012

Create a Chart Report

1. Start by creating a Grid report.
2. Change the Report Type.
3. Select Grouping.
4. Adjust Chart Options.



Grouping

1. Click Add.

- Click to add the grouping.
- Add multiple groups if desired. You can organize the grouping by dragging the desired fields up or down to prioritize them (primary or secondary).

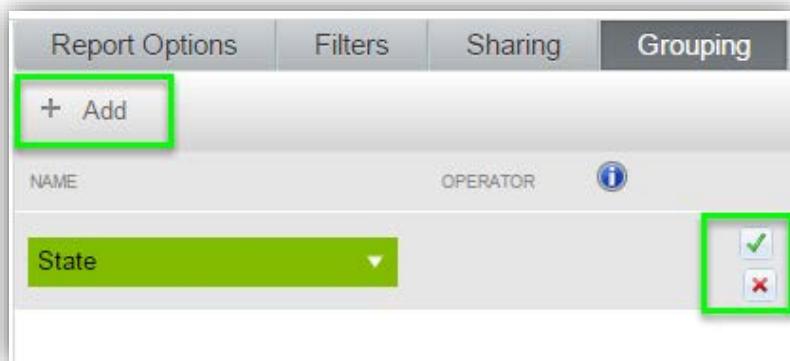


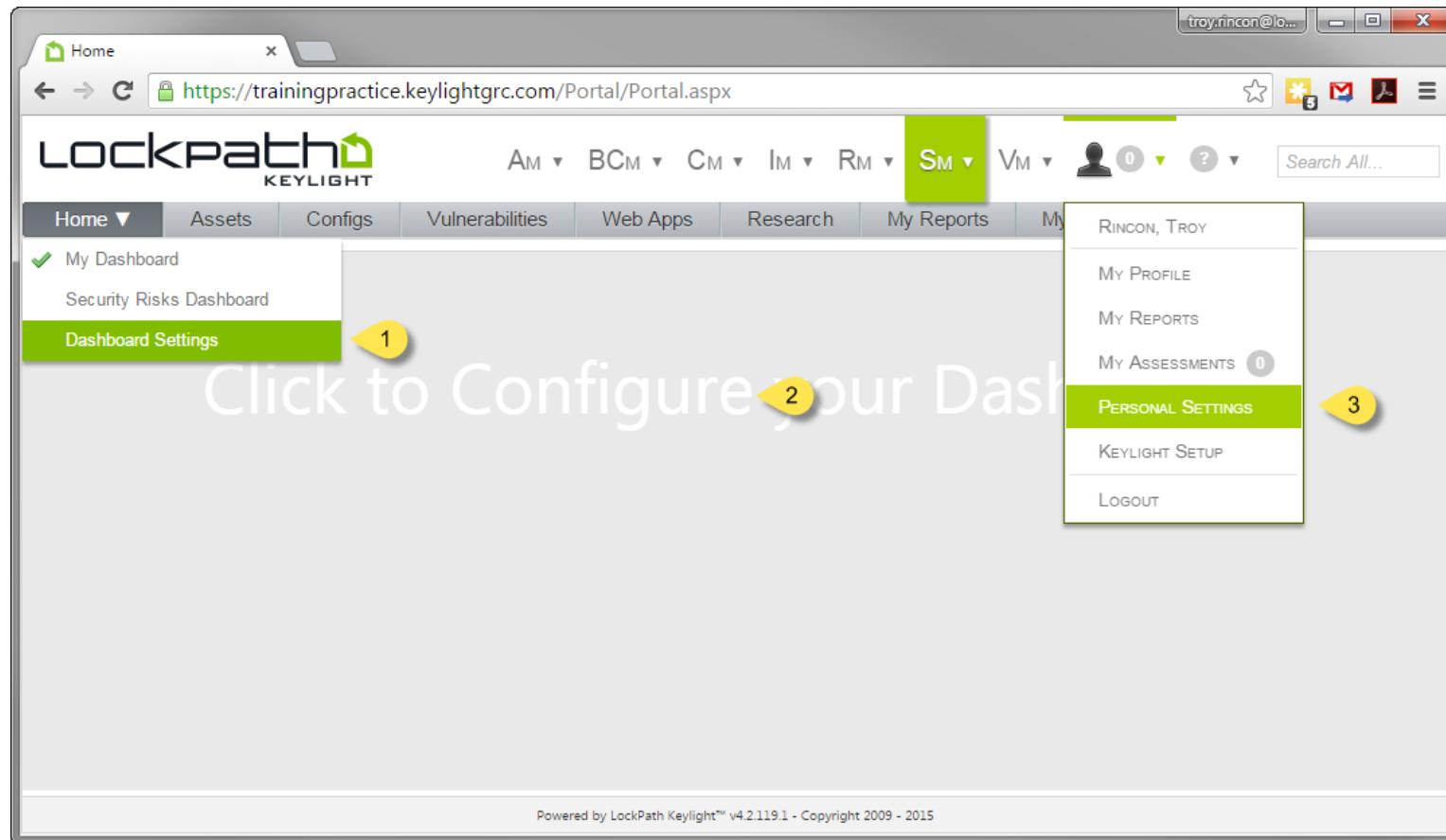
Chart Options

1. After grouping, add the desired chart options.
2. Set the Series Mode to adjust the visual layout of grouped items.



Dashboard Customization

1. Customize your Dashboard from three areas.



Dashboard Customization

Setup Portlets

1. Drag Available Portlets to a Section or click Add Portlet

Home > Personal Settings > Sm > My Dashboard

My Dashboard

Use this page to customize your dashboard configuration. Drag available portlets to the sections. Each section represents a new row within the dashboard. Once you have finished configuring your dashboard, from the Keylight menu in the upper left, click "Home" to return to the dashboard page.

+ Add Portlet... 1 Add Section

SECTION/PORTLET	TYPE
Section 1	
Available Portlets (Not Visible)	
Compliance Docs by Stage	System Content
Control Compliance Doc Gap Analysis	System Content
Login History	System Content
My Acknowledged Compliance Documents	System Content

Align Portlet Layout

1. Portlets are displayed left to right
2. Sections are stacked vertically.

SECTION/PORTLET	TYPE
Section 1	
Devices by Assignment	Reportlet
Devices by Type	Reportlet
Section 2	
Overall Awareness	System Content
Login History	System Content

