

Certification Assistant Partner

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Certification Assistant Partner Process

The process between Certification Assistant (CA) and Certification Assistant Partner (CAP) contains many steps designed to walk users and consultants through the process efficiently.

1. CA users will request an engagement using the Partner Engagement feature.
2. CA organization and the CAP organization will discuss and agree to terms offline.
3. CAP administration will Accept or Decline the engagement.
 - a. If Declined, the engagement process is terminated.
4. When Accepted, CAP administration will assign a lead consultant and, if needed, additional consultants to the project.
5. CAP consultants will request access to the CA organization's account to review content, assign actions, and/or upload documentation.
6. CA organization will Accept or Decline access.
 - a. If Declined, the CA and CAP users will work on assessment/review activities through other means.
7. CAP consultants will perform the assessment and complete agreed upon activities.
8. The access to the CA organization will be disconnected. Note – if needed, the consultant may request access again. At this stage, the consultant will produce a report (reviewed by CAP management).
9. CAP consultant will deliver the final report to the CA organization electronically through the Partner Engagement feature.
10. If both parties agree, then the engagement can be terminated, and the project will be marked complete.

Project status is available in CA under Partner Engagement and in CAP on all the management screens.

This document will only cover CAP functions, see Certification Assistant Lite or Certification Assistant Stand/Premium for details on the CA functions for Partner Engagement.

CAP User Levels

There are three user levels within CAP: CAP Admin, CAP Manager, and CAP Consultant. The CAP Admin user is responsible for Accepting or Declining engagements, assigned consultants and overall access to the CAP system. The CAP Manager role is responsible for engagement and project oversight and documentation review. The CAP Consultant role is responsible for executing the project, interacting with the client organization, and producing the final report.

CAP Dashboard

The screenshot displays the CAP Dashboard for a CAP Admin user. The dashboard is titled "EXOSTAR Certification Assistant Partner" and includes a user profile for "Mack Changez". The main content area is divided into three columns: Clients, Projects, and Consultants. Each column has a summary section with colored boxes indicating counts for different categories. Below these are tables for "Pending Client List", "Unassigned Project List", and "My Active Projects". A "Message Inbox" section is also present on the right side.

Clients Summary: 1 Pending Clients, 1 Active Clients, 0 In-Active Clients, 1 Total Clients

Projects Summary: 1 Unassigned Projects, 0 Kick-Off Projects, 1 Active Projects, 1 Completed Projects, 2 Total Projects

Consultants Summary: 1 Benchmarked Consultants, 1 Active Consultants, 2 Total Consultants

Pending Client List:

Company/Point Of Contact	Status
Wise Hardware Wise, David P: 480-255-1212 E: wise@ivis.com	Request Engagement

Unassigned Project List:

Company/POC	Scope	Phase	Project Start	Status
Wise Hardware Wise, David P: 480-255-1212 E: wise@ivis.com	Readiness Assessment	CMM/C Level 3	09/08/2020	Project Kick-off

My Active Projects:

Company / Point Of Contact	Scope	Phase	Project Start	Project End	Consultant(s)	Status	Last Update
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Message Inbox:

From	Subject	Received	Level	Type
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All users have access to the same dashboard, although the information on the dashboard is filtered based on their role. The view above is for a CAP Admin user.

Clients Panel

The Clients Panel displays summary statistics for client status and a list of pending clients. The summary statistics are as follows:

1 Pending Clients	1 Active Clients	0 In-Active Clients	1 Total Clients
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The Pending Client List table is as follows:

Company/Point Of Contact	Status
Wise Hardware Wise, David P: 480-555-1212 E: wise@ivis.com	Request Engagement

This panel displays the active counts for Pending, Active, In-Active and Total Clients. The list below is for Pending Clients, or clients that have requested an engagement, and that engagement has not been accepted or declined.

Projects Panel

The Projects Panel displays summary statistics for project status and a list of unassigned projects. The summary statistics are as follows:

1 Unassigned Projects	0 Kick-Off Projects	1 Active Projects	1 Completed Projects	2 Total Projects
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The Unassigned Project List table is as follows:

Company/POC	Scope	Plans	Project Start	Status
Wise Hardware Wise, David P: 480-555-1212 E: wise@ivis.com	Readiness Assessment	CMMC Level 3	09/08/2020	Project Kick-off

Like the Clients panel, the Projects panel displays counters for Unassigned, Kick-off, Active, Completed and Total Projects. An Unassigned project currently has no consultants assigned. A Kick-Off project has been assigned, but the consultant has not requested access to the CA organization’s account.

The list below the counters, displays the projects that are currently not assigned.

Consultants & Message Inbox Panel

The screenshot displays a dashboard with two main sections. The top section, 'Consultants', features three colored boxes: an orange box with '1 Benced Consultants', a green box with '1 Active Consultants', and a blue box with '2 Total Consultants'. The bottom section, 'Message Inbox', has a dark header with 'Message Inbox' text and two buttons: 'New Message' (blue) and 'Message Inbox' (green). Below the header is a table with columns: From, Subject, Received, Level, and Type. The table body is empty.

Counters for Benced, or currently unassigned consultants, Active, and Total Consultants are found in this panel. Below the counters is the Message Inbox. See the Messaging section later in this document for details.

My Active Projects

If the current user is a CAP Consultant, this panel will show all active projects the consultant is assigned to.

My Active Projects							
Company / Point Of Contact	Scope	Plans	Project Start	Project End	Consultant(s)	Status	Last Update
Wise Hardware Wise, David P: 480-555-1212 E: wise@ivis.com	Readiness Assessment	CMMC Level 3	09/08/2020		Steven McInfo - Lead	Project Kick-off	09/08/2020 04:15 PM PDT

Navigation

The left side navigation buttons are used to move around in the system.

Dashboard

1
Clients

1
Projects

Documents

2
Consultants

Settings

- Dashboard – return to the ‘home page’
- Clients – access the Client Management screen, the number reflects the number of active clients.
- Projects – access the Project Management screen, the number reflects active projects.
- Documents – access to the repository of active and completed documentation/reports from engagement projects.
- Consultants – access to the Consultant assignment utility and the number reflects total consultants.
- Settings – CAP Admin only access to the role management features to adjust CAP user roles.

Client Management

EXOSTAR Certification Assistant Partner

Certification Assistant Partner Mack Changez 0

Dashboard

- 1 Clients
- 1 Projects
- Documents
- 2 Consultants
- Settings

Company / Location	Point Of Contact	Contact Details	Last Update	Status	Action
Wise Hardware	Wise, David	P: 480-555-1212 E: wise@vix.com	09/09/2020 02:47 PM PDT	Request Engagement Readiness Assessment CHMC Level 3	Accept Decline
			09/31/2020 04:32 PM PDT	Engagement Closed Readiness Assessment CHMC Level 3	

CAP Admin – Accept or Decline engagement requests and when accepted, Terminate active engagements.

CAP Manager & CAP Consultant – Read-only access.

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Dashboard

- 1 Clients
- 1 Projects
- Documents

Company / Location	Point Of Contact	Contact Details	Last Update	Status	Action
Wise Hardware	Wise, David	P: 480-555-1212 E: wise@vix.com	09/09/2020 04:15 PM PDT	Pending Consultant Assignment Readiness Assessment CHMC Level 3	
			09/31/2020 04:32 PM PDT	Engagement Closed Readiness Assessment CHMC Level 3	

Project Management

CAP Admin – Assign Consultant(s) to accepted project engagements.

The screenshot shows the EXOSTAR CAP Admin interface. The top header includes the EXOSTAR logo, the role 'Certification Assistant Partner', and user information 'Mack Changez'. A left sidebar contains navigation buttons for Dashboard, Clients (1), Projects (1), Documents, Consultants (2), and Settings. The main content area is divided into three sections: Active Projects, Pending Projects, and Completed Projects. Each section contains a table with columns for Company/Point Of Contact, Engagement Stage, Scope, Plans, Project Start, Consultant(s), Status, Last Update, and Action.

Active Projects									
Company / Point Of Contact	Engagement Stage	Scope	Plans	Project Start	Consultant(s)	Status	Last Update	Action	
Wise Hardware Wise, David P: 480-555-1212 E: wise@ivis.com	Pending Consultant Assignment	Readiness Assessment	CHMC Level 3	09/08/2020	- Lead	Project Kick-off	09/08/2020 03:47 PM PDT	Assign Consultant(s)	

Pending Projects									
Company / Point Of Contact	Engagement Stage	Scope	Plans	Project Start	Consultant(s)	Status	Last Update	Action	
Wise Hardware Wise, David P: 480-555-1212 E: wise@ivis.com	Request Engagement	Readiness Assessment	CHMC Level 3	09/08/2020	- Lead	Project Kick-off	09/08/2020 03:47 PM PDT		

Completed Projects									
Company / Point Of Contact	Engagement Stage	Scope	Plans	Project Start	Project End	Consultant(s)	Status	Last Update	Action
Wise Hardware Wise, David P: 480-555-1212 E: wise@ivis.com	Engagement Closed	Readiness Assessment	CHMC Level 3	08/31/2020	08/31/2020	Steven McInfo - Lead	Project Completed	08/31/2020 04:32 PM PDT	

CAP Manager – Read-only access to view status.

The screenshot shows the EXOSTAR CAP Manager interface, which is a read-only view of the same data as the CAP Admin interface. The layout is identical, including the EXOSTAR logo, role 'Certification Assistant Partner', user 'Mack Changez', and the same navigation sidebar and project tables (Active, Pending, Completed).

Active Projects									
Company / Point Of Contact	Engagement Stage	Scope	Plans	Project Start	Consultant(s)	Status	Last Update	Action	
Wise Hardware Wise, David P: 480-555-1212 E: wise@ivis.com	Pending Consultant Assignment	Readiness Assessment	CHMC Level 3	09/08/2020	- Lead	Project Kick-off	09/08/2020 03:47 PM PDT		

Pending Projects									
Company / Point Of Contact	Engagement Stage	Scope	Plans	Project Start	Consultant(s)	Status	Last Update	Action	
Wise Hardware Wise, David P: 480-555-1212 E: wise@ivis.com	Request Engagement	Readiness Assessment	CHMC Level 3	09/08/2020	- Lead	Project Kick-off	09/08/2020 03:47 PM PDT		

Completed Projects									
Company / Point Of Contact	Engagement Stage	Scope	Plans	Project Start	Project End	Consultant(s)	Status	Last Update	Action
Wise Hardware Wise, David P: 480-555-1212 E: wise@ivis.com	Engagement Closed	Readiness Assessment	CHMC Level 3	08/31/2020	08/31/2020	Steven McInfo - Lead	Project Completed	08/31/2020 04:32 PM PDT	

CAP Consultant – Manage interactions with the CA organization, access project documentation, access the client account data.

Request CA Access

The screenshot shows the EXOSTAR Certification Assistant Partner dashboard. On the left, there is a sidebar with 'Dashboard', '1 Clients', '1 Projects', and 'Documents'. The main content area is divided into three sections: 'Active Projects', 'Pending Projects', and 'Completed Projects'. Each section contains a table with columns for Company/Point Of Contact, Engagement Stage, Scope, Plans, Project Start, Consultant(s), Status, Last Update, and Action.

Company / Point Of Contact	Engagement Stage	Scope	Plans	Project Start	Consultant(s)	Status	Last Update	Action
Wise Hardware Wise, David P:480-355-1212 E:wise@ivis.com	Pending Consultant Assignment	Readiness Assessment	CM/MC Level 3	09/08/2020	Steven McInfo - Lead	Project Kick-off	09/08/2020 04:13 PM PDT	Request CA Access

The consultant will click on the Request CA Access button to send a notification to the CA user requesting access to their account data. The CA user can then Accept or Decline the request. If the request is declined, the CA user and CAP consultant will be responsible to sharing information via other methods.

After the CA Access Request is accepted by the CA organization:

Access Client

The screenshot shows the EXOSTAR Certification Assistant Partner dashboard after the CA Access Request has been accepted. The 'Active Projects' table now includes three buttons in the 'Action' column: 'Access Client' (green), 'Update Documentation' (blue), and 'Disconnect Access' (orange).

Company / Point Of Contact	Engagement Stage	Scope	Plans	Project Start	Consultant(s)	Status	Last Update	Action
Wise Hardware Wise, David P:480-355-1212 E:wise@ivis.com	Assessment	Readiness Assessment	CM/MC Level 3	09/08/2020	Steven McInfo - Lead	Under Project	09/08/2020 04:17 PM PDT	Access Client Update Documentation Disconnect Access

To enter the CA organization's account, the consultant will click on Access Client.

Clicking on the Access Client button will redirect the consultant to the client's account in CA.

EXOSTAR Certification Assistant Standard

Now Viewing: Wise Hardware
Exit Client

Certification Assistant Standard Steven McInfo

Plans

Cybersecurity Maturity Model Certification (CMMC)

% Controls Complete

79% Complete 21% Incomplete

% Control Answers

39% Yes 20% No 17% N/A 24% Partially No Answer

% Control Action Status

50% Open 50% Closed Past Due

Tasks

Filter: Select Filter

Action Items

Task	Start Date	Due Date	Status

Message Inbox

New Message Message Inbox

From	Subject	Received	Level	Type
David Wise	Meeting next week	Aug 31, 2020 02:08 PM PDT	Normal	Message

Help & Profile

Help Support Import MST SP-000-171 data from Exostar Partner Information Manager UPGRADE!

All functions of CA are now available to the consultant as if they were a user in the client's account. The consultant can review the information entered by the client, you can assign action items to users in the client organization, and you can leave comments on Self Assessment practices and processes for the client to review.

Provide feedback to the client regarding this control:

Feedback from Consultant/Assessor regarding this control:

The last comment entered by the consultant will be included in the report delivered at the end of the project. Use the Exit Client button in the header green box to return to CAP.

Update Documentation

Click the Update Documentation button to switch over to the Documents section for access to the report for this client. Details on the Document section are provided below.

Disconnect Access

When the consultant has completed work needed in the CA organization's account, click the Disconnect Access button to remove the ability to enter their account. If needed, access can be requested again.

Consultant Management

CAP Admin users will use the Consultant Management to assign consultants to projects. Click on the View/Edit button to access the details page.

Name	Role(s)	Engagements	Actions
Dalbos, Nancy	CAP Consultant	No Active Engagements/Projects	View/Edit
McInfo, Steven	CAP Consultant	No Active Engagements/Projects	View/Edit

On the Consultant Details page, there are lists for this consultant's Assigned Active Projects, Active Project – which are projects that are available to be assigned to and Completed Projects. To assign the consultant to the project, click on the Assign To Project button. If there are no currently assigned consultants, the selected consultant will be assigned as the Lead. Otherwise, they will be added to the list of available consultants on the project.

Consultant Details

Details

Name: Steven McInfo
Email: consultant@vis.com
Phone: 480-555-1234

[Return to List](#)

Assigned Active Projects

Project	Client	Engagement Status	Plan	Status	Consultants	Start Date	End Date	Last Update	Action
Readiness Assessment	Wise Hardware	Pending Consultant Assignment	CHMC Level 3	Project Kick-off	-Lead	09/08/2020	09/08/2020 02:47 PM PDT		Assign To Project

Active Projects

Project	Client	Engagement Status	Plan	Status	Consultants	Start Date	End Date	Last Update	Action
Readiness Assessment	Wise Hardware	Pending Consultant Assignment	CHMC Level 3	Project Kick-off	-Lead	09/08/2020	09/08/2020 02:47 PM PDT		Assign To Project

Completed Projects

Project	Client	Plan	Status	Consultants	Start Date	End Date	Last Update
Readiness Assessment	Wise Hardware	CHMC Level 3	Project Completed	Steven McInfo - Lead	09/31/2020	09/31/2020	09/31/2020 04:32 PM PDT

Consultants can also be removed from projects on this page, click on the Remove From Project and their name will be removed.

Documents

The Documents section is used to create the final reports for consultants to send to their clients. From the Project section, click on Update Documentation to access Documents. Also, clicking on the Documents left navigation button will open the Documents section. To work on the documentation for a project, click on the Access Documentation button.

Company / Point Of Contact	Scope	Plans	Project Start	Project End	Consultant(s)	Status	Last Update	Action
Wise Hardware Wise, David P: 480-555-1212 E: wise@ivis.com	Readiness Assessment	CHMC Level 3	08/31/2020	08/31/2020	Steven McInfo - Lead	Project Completed	08/31/2020 04:32 PM PDT	Access Documentation

Until there has been a document created, the message No Documentation created for this Project. To start, click on the Edit button.

Company / Point Of Contact	Scope	Plans	Project Start	Project End	Consultant(s)	Status	Last Update	Action
Wise Hardware Wise, David P: 480-555-1212 E: wise@ivis.com	Readiness Assessment	CHMC Level 3	08/08/2020		Steven McInfo - Lead	Under Project	08/08/2020 04:17 PM PDT	EDIT No Documentation created for this Project Return to Documents

Project Scope: Readiness Assessment

Executive Summary:

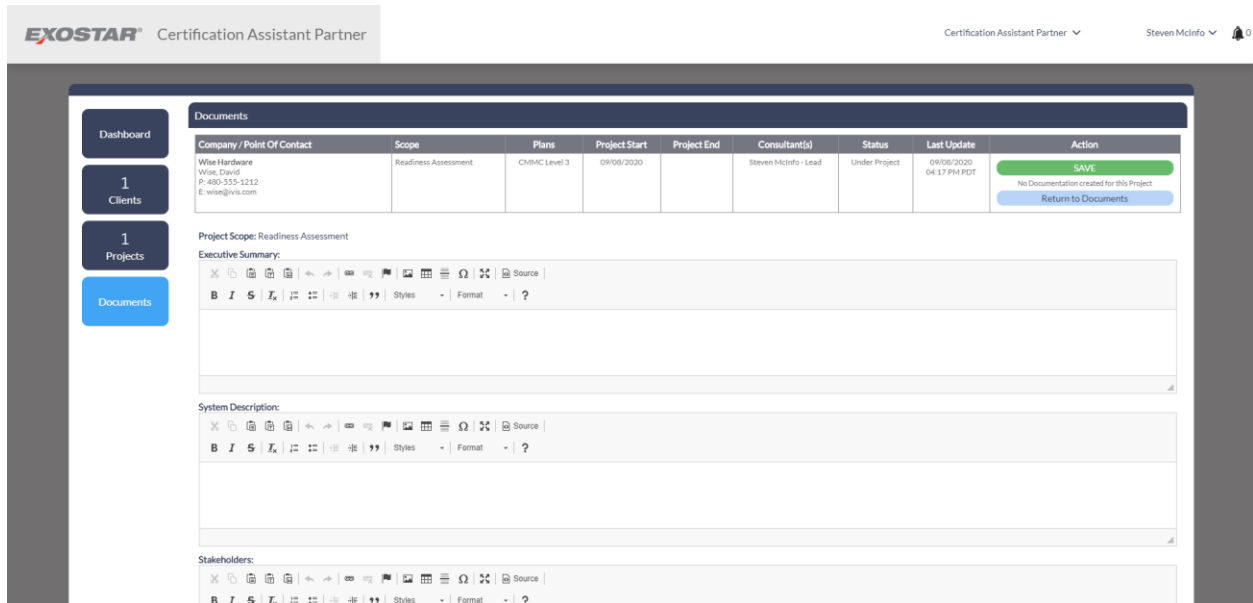
System Description:

Stakeholders:

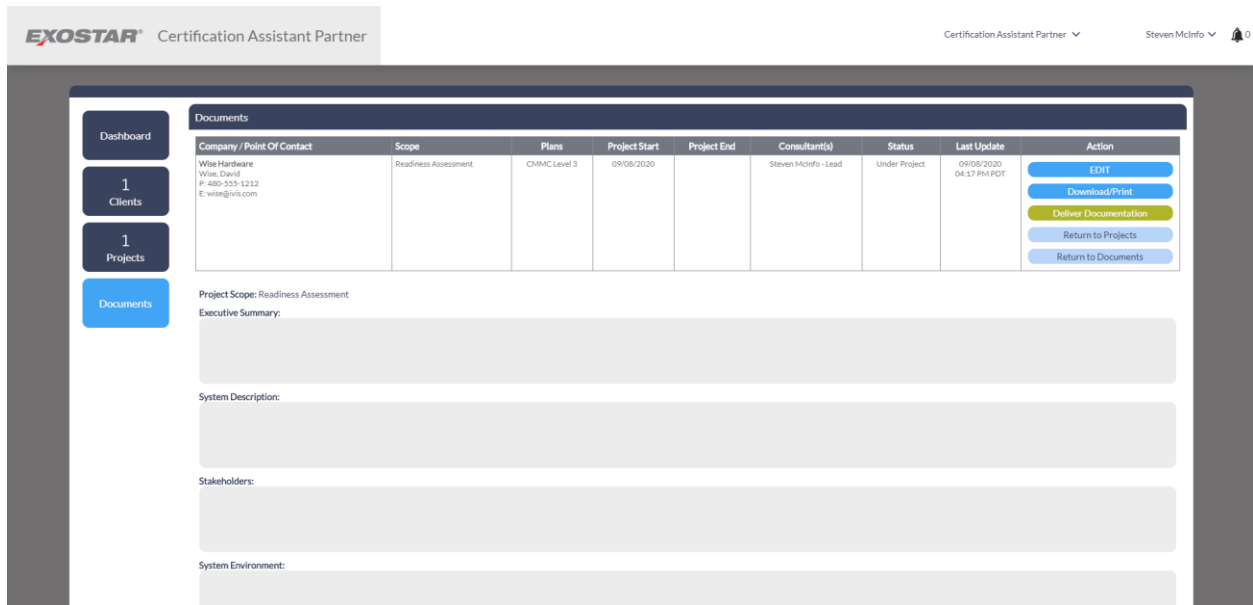
System Environment:

Policies:

The consultant will enter their assessment into each of the text areas and click on Save. This will create a new documentation record or update the existing record.



Once the documentation is created, options for Download/Print and deliver Documentation are enabled. Download/Print will make a PDF version of the documentation available for print or saving to your local system. Deliver Documentation will send a PDF of the document to the CA organization and send a notification via the messaging system. Use the Return to Projects or Return to Documents buttons to navigate back to those sections.



If needed, the document can be edited after being sent to the CA organization by clicking on the Update Documentation button. Resending the document after edits will replace the original sent to the CA organization.

Settings

Manage CAP users via the Settings section. Only CAP Admin users will have access to this section.

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Settings

Name	Role(s)	Actions
Changex, Mack	CAP Admin	View/Edit
Dalboss, Nancy	CAP Consultant CAP Management	View/Edit
McInfo, Steven	CAP Consultant	View/Edit

Unassigned Users

Name	Actions
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Settings

Click on the View/Edit button to access the User Details page.

EXOSTAR Certification Assistant Partner

Certification Assistant Partner Mack Changez 0

User Details

Details

Name	Steven McInfo
Email	consultant@ivis.com
Phone	480-555-1234

Roles

- Administrator
- Management
- Consultant

[Return to List](#)

Active Projects

Project	Client	Plan	Status	Start Date	End Date	Last Update
Readiness Assessment	Wire Hardware	CHMC Level 3	Project Completed	08/21/2020	08/21/2020	08/21/2020

Settings

Select the user's role(s) and the selection will autosave. If you are viewing the only remaining CAP Admin user in the system, you will be prevented from removing that role as there must always be at least one admin user.

If Consultant is selected, the Active Projects list will be shown below. Use the Return to List link to return to the home page for Settings.

Messaging

Message notifications are found in the upper right next to your username.

David Wise ▾  0

If the number next to the bell is higher than 0, then you have new messages waiting.

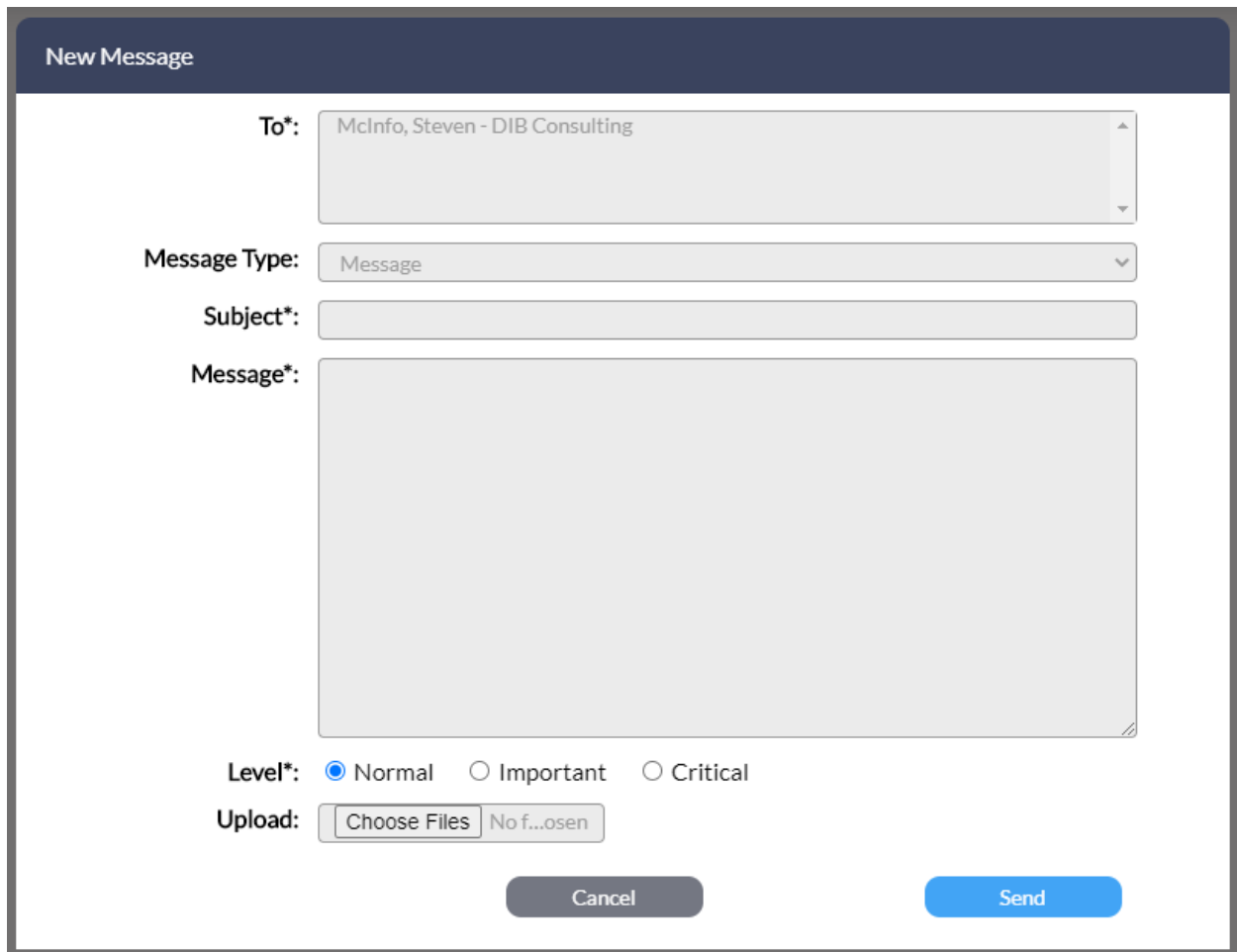
Your messages will appear in the Message Inbox on the homepage.



To increase the size of the window, click on the Message Inbox button and the messages feature will go to full screen.



To send a message, click on the New Message button.



The screenshot shows a 'New Message' dialog box with a dark blue header. The form contains the following fields and controls:

- To*:** A dropdown menu with the selected value 'McInfo, Steven - DIB Consulting'.
- Message Type:** A dropdown menu with the selected value 'Message'.
- Subject*:** An empty text input field.
- Message*:** A large, empty text area for the message body.
- Level*:** Three radio button options: 'Normal' (selected), 'Important', and 'Critical'.
- Upload:** Two buttons: 'Choose Files' and 'No f...osen'.
- Buttons:** 'Cancel' and 'Send' buttons at the bottom.

The required fields are flagged with an asterisk (*). Select one or multiple users from the To box. Use the CTRL or Apple key to select multiple. All users within your account and any consultants you are currently engaged with will be available on the list. To see more about consultants, see the Partner Engagement section.

Select your Message Type, enter a subject and enter your message. Select the Level for the message and attach files if needed. Any files attached will be uploaded and encrypted. Click the Send button and the message will show up in your sent list.

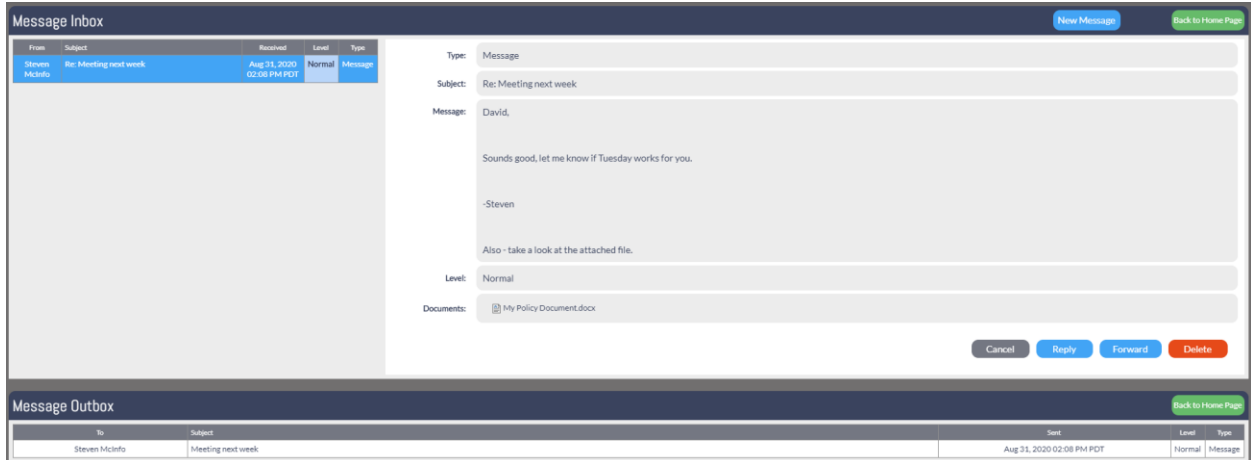
New messages will be highlighted blue and always at the top of the list.



The screenshot shows a 'Message Inbox' header with 'New Message' and 'Message Inbox' buttons. Below is a table with one row highlighted in blue.

From	Subject	Received	Level	Type
Steven McInfo	Re: Meeting next week	Aug 31, 2020 02:08 PM PDT	Normal	Message

Click on the message to view.



The screenshot shows the 'Message Inbox' header with 'New Message' and 'Back to Home Page' buttons. The message content is displayed in a large text area. Below the message content are buttons for 'Cancel', 'Reply', 'Forward', and 'Delete'. At the bottom, there is a 'Message Outbox' header with 'Back to Home Page' and a table showing the sent message.

Message Content:

Type: Message

Subject: Re: Meeting next week

Message: David,
Sounds good, let me know if Tuesday works for you.
-Steven
Also - take a look at the attached file.

Level: Normal

Documents: My Policy Document.docx

Buttons: Cancel, Reply, Forward, Delete

Message Outbox Table:

To	Subject	Sent	Level	Type
Steven McInfo	Meeting next week	Aug 31, 2020 02:08 PM PDT	Normal	Message

To reply to this message, click on the Reply button and Send when your message is complete. Similarly, to Forward to another user, click on Forward and Send when your message is complete.