GLOBAL DIGITAL FORENSICS

WORKBOOK GUIDE

OT Assessment Project Workbook Guide

How to use each sheet, in order

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> Use this guide with the workbook in the same download. It takes about ten minutes to read.

Questions about this document: call (800) 868-8189 or write to info@evestigate.com.

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Start in this order

The OT assessment project workbook has 22 sheets. This guide explains what each one records, the order to use them and how to print.

First week

Open Start, then Preparation and Uncertainty. Preparation lists the records to gather and who usually holds them; Uncertainty lists the questions to settle before scoping. Assign an owner and a target date to each row you can.

Scope

Use Applicability to record, for each entity, facility and rule, whether it applies and why. Record proposed exclusions in Scope decisions with the reason and the reviewer. Requirements holds one row per clause you will test.

Examine

Work plan sequences the tasks. Control checks holds the procedures with the evidence to request and the acceptance condition. Evidence logs each record with its source, collection date and integrity value. Activity permits records the operating approval for any field activity.

Report and hand over

Findings records the condition, criterion, consequence, owner and retest. Notifications keeps each reporting clock separate. Recurring duties carries dated obligations forward after the project.

Every sheet

Amber cells take your entries. Pale blue cells show context or calculated values. Drop down lists limit status fields to the values the formulas count.

Sheet	What it records
Start	Purpose, project status counts and the sign off record.
Work plan	Proposed tasks by sector and stage with owner, predecessor, work product, acceptance test, due date and completion evidence.
Applicability	One row per state and sector to research, with the decision, facility boundary, controlling rule, evidence and date.
Assets	The OT asset inventory: function, owner, zone, model, version, protocols, dependencies and support status.
Control checks	Proposed control procedures with expected evidence, acceptance condition, population, samples, method, observations and review.
Evidence	Each record collected, with source owner, period, collection method, collector, integrity value and storage location.

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Sheet	What it records
Activity permits	Operating approval for each field activity: targets, method, window, stop conditions, recovery owner and results.
Findings	Observation, criterion, evidence, consequence, priority, corrective action, verification and closure.
Notifications	Reporting duties by scope with the trigger, clock rule, recipient, deadline calculation and receipt.
Local duties	City, county and other local requirements for each facility.
Recurring duties	Dated obligations that continue after the project, with the calendar rule and next due date.
Sources	The source register: title, publisher, link, the part to read and its status.
Review log	Your project review challenges and how each was resolved.
State research	One starting source per state with what it covers and the link.
Scope decisions	Proposed exclusions by sector with the reason, reviewer and deferred work.
Edition record	The workbook edition and your own project revisions.
Preparation	Records to gather before scoping, with the likely custodian and why the assessment needs each one.
Uncertainty	Questions to settle before scoping, what to obtain and how each affects the plan.
Requirements	One row per clause you will test, mapped to procedures and the conclusion.
Field record	A one page print view of a single procedure for field use.
Assessment prep	Preparation tasks by assessment type: audit, control review and penetration test.
State depth	The state research checklist: one row per state, with the rule you find for each sector.

Working conventions

Statuses

Applicability decisions start as Unresolved. Choose Applicable or Not applicable with reason once the facility facts and the controlling rule are on record. The Start sheet counts open and incomplete decisions so the project manager can see which decisions are open.

Dates

Keep legal deadlines and project target dates in separate columns. A target date is a plan; the deadline column cites the rule that sets it.

Field record

Field record prints one procedure at a time. Choose the procedure ID in B5 and the linked fields fill from the procedure register. Enter results in the owning register.

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Printing

Start and Field record print portrait, one page wide. The registers print landscape with the ID column and header row repeated on every page. Wide registers read best on screen; for field use print the Field record view or a filtered copy.

Adding rows

Insert rows inside a table so its formulas and lists extend. Keep IDs unique, because Field record and the Start counts look rows up by ID.

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Questions about the workbook

A senior GDF examiner can walk your team through the workbook and the assessment plan on a free first call.

Get a free consultation. The initial consultation is free, and requests are handled in confidence.

Call (800) 868-8189 at any hour, or write to info@evestigate.com.

Request a consultation online at evestigate.com/contact.

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