

Some helpful tips for using the Risk Assessment Tool

1. Start by enabling the macros

In Excel 2007 or 2010:

Click the circle in the upper left corner of the Excel screen

Click Options near the bottom of the list

Click Trust Center on the left, then the Trust Center button to the right

Click Macro Settings and select "Enable macros..." and be sure to click OK at the bottom of the screen to close all the open screens

In Excel 2003:

Click Tools

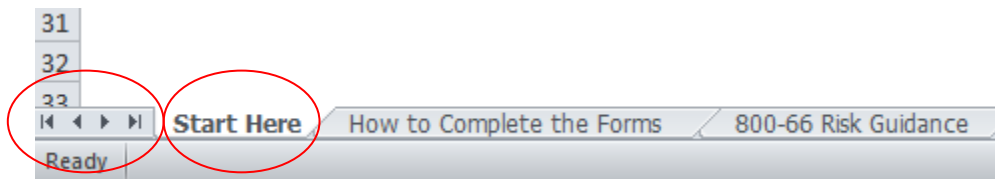
Click Options

Click the Security tab

Click the "Low..." option then click OK

Close Excel and re-open it. If asked, select "Enable Macros" on the screen.

2. Click on the "Start Here" tab (bottom left corner of the spreadsheet)



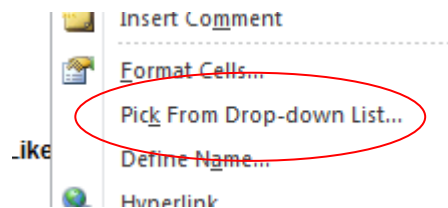
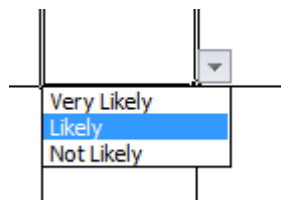
To navigate through the many "tabs", there are arrows to the far left of the bar on the far left side. Click the > arrow to move to the right on the tab bar.

3. Click on the blue button, labeled, "Screening Questions"
4. Answer the questions within the provided open box on the left side
5. Ignore the drop down boxes on the right side with High, Medium and low. They are pre-populated for you.
6. Move through the questions by clicking the next tab. At the top of the screen, click each tab and fill in the information requested. Be sure to click SAVE at the bottom left side of the screen before exiting the screen.

7. Using the arrow buttons shown in number 2, go to the tab named “People and processes (step 2a).

- You will need to answer the information in the column labeled, “likelihood” and “impact”. Click once in the cell with “likelihood. A small arrow will appear in the lower corner of the cell. Click the arrow to open a box with options for that cell. Click the correct option. Click the next cell and get the same arrow box with other options. Repeat for each cell. In Office 2003, with the right mouse button click once on the cell and select “Pick from drop-down list...”

	Likelihood	Impact
	Likely	High



- Everything else should be pre-populated from your earlier work in the Screening Questions portion of the tool

8. Next, select “Technology (step 2b)” on the tab bar at the bottom of the screen.

- You will need to answer the information in the column labeled, “likelihood” and “impact” in the same manner as the section above.
- Everything else should be pre-populated from your earlier work in the Screening Questions portion of the tool
- To keep the column headings in place as you move down the spreadsheet:

In Office 2007/2010, click the first cell of the first row BELOW the headings you want to freeze.

Click the word VIEW at the top of the Excel toolbar.

Click Freeze Panes and select the first option.

In Office 2003, click the first cell below the headings row

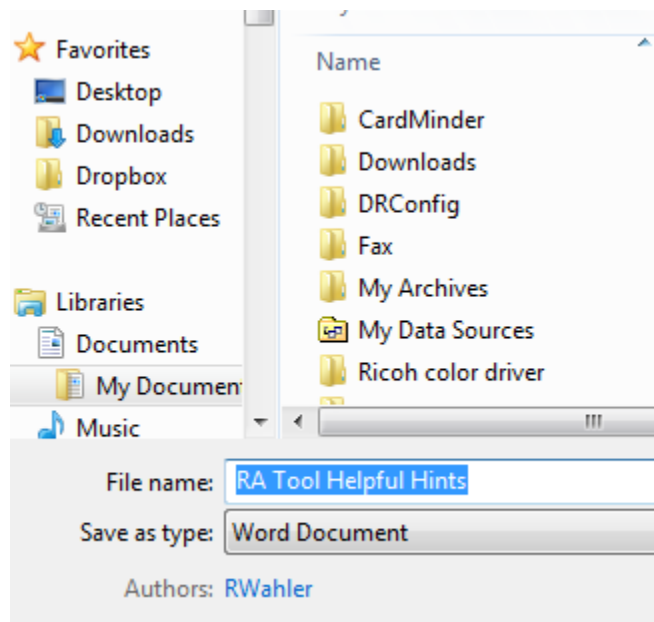
Click "Window" in the Excel toolbar at the top of the screen.

Click "Freeze Panes" and the first 8 to 10 rows will stay stationary while scroll down the spreadsheet.

9. Using the arrow keys at the far left of the tab bar at the bottom of the screen; click the "Findings-Remediation (step 3)" tab at the bottom of the screen.

- You will need to put in your information in the columns labeled, "owner, remediation steps, and target date".

- 10. Save your work.** To "save", click the circle in the upper left corner of the screen, select **SAVE AS**. In Office 2003 click "FILE" in the upper left corner, select **SAVE AS**. A window similar to the one below will open up.



NOTE that the name of the document is highlighted. Type the name of **your practice-Risk Tool** and click SAVE. Be sure that you are saving the document where you can find it again the next time you need to work on it.

For example, save in “My Documents” (if it is your computer) or save it to a “thumb drive”.