Incident Preparer - Workflow

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Log In to the Incident Response Management Dashboard

This procedure outlines how to securely log into the dashboard, complete multi-factor authentication, and utilize the Forgot Password interface.

> **Warning:** *Do not share your login credentials or MFA verification codes. Unauthorized access may compromise sensitive incident data.*

Login

1. Navigate to the dashboard login page: https://cdt-cc-prod.agilsoft.cloud/worker-portal/login.
2. Upon arriving at the dashboard login page, a **Security Warning** message will appear. Select **OK**.

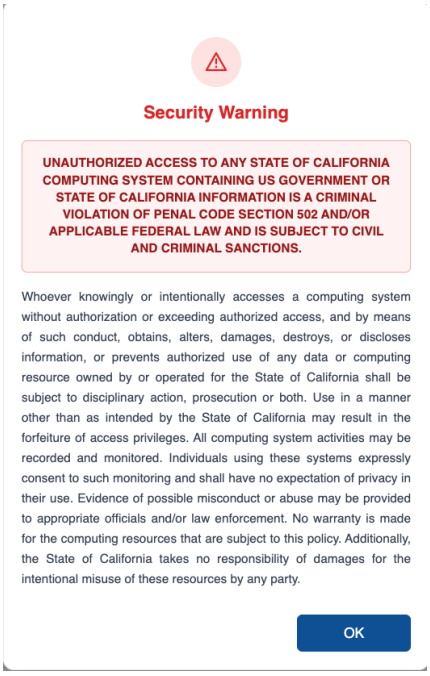

Figure 1: Security Warning Prompt

3. Enter your email address in the **User** field.
4. Enter your password in the **Password** field and select **Sign in**.

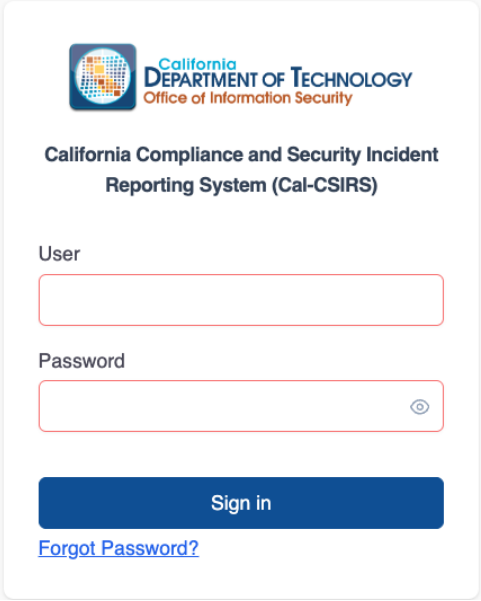

Figure 2: User Login Screen

5. Open your authenticator application on your mobile device.
6. Enter the six-digit verification code into the **Authentication Required** field and select **Confirm**.

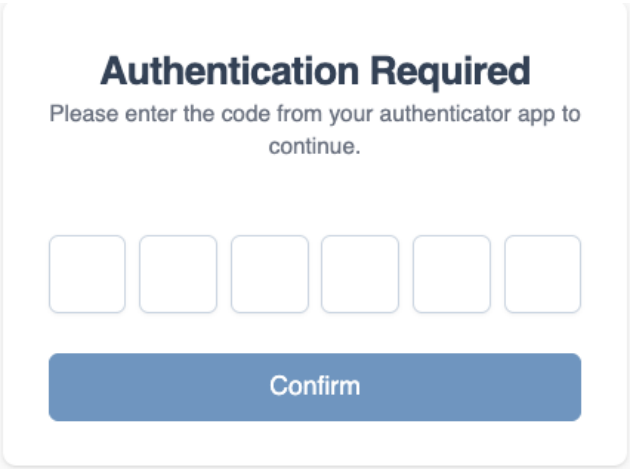

Figure 3: MFA Authentication Screen

Forgot Password

1. For a forgotten password, select the **Forgot Password** link located below the **Sign In** button on the login page.
2. Enter the email address for the forgotten password. Select **Confirm**.

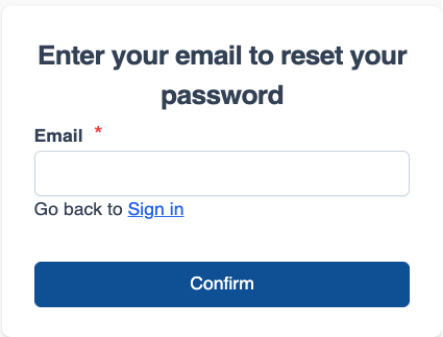

Figure 4: Email Screen for Password Reset

3. Navigate to your email inbox. A **Verification Code** will be sent using a no-reply email address with the subject line: Your **Verification Code**. Copy the **Verification Code** and navigate back to the browser.

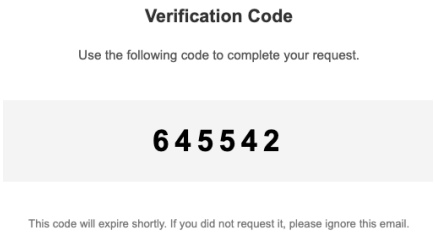

Figure 5: Verification Code

4. Enter the **Verification Code** in the field. Enter a new password into both the **New password** and **Confirm Password** fields.

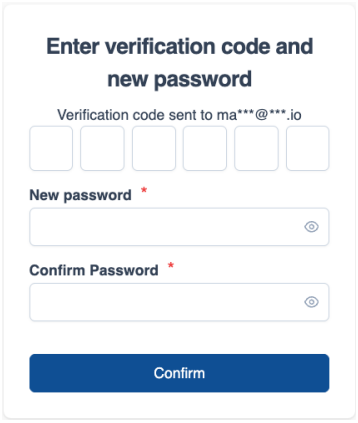

Figure 6: Enter Verification Code and New Password

5. Repeat steps 2-5 of the Login instructions to log in.

Navigate the Incident Response Management Dashboard

This procedure outlines how to navigate key interface components including the dashboard and the user profile.

1. Once logged in, the Incident Response Management Dashboard will appear.
    a. Expand or collapse the Navigation menu by selecting the **hamburger icon (three horizontal lines)** in the upper corner.
    b. Use the **Search Bar** in the top header to locate modules by name.
    c. Open the user profile in the upper-right corner of the screen by selecting the user's name, then select **My Profile**.

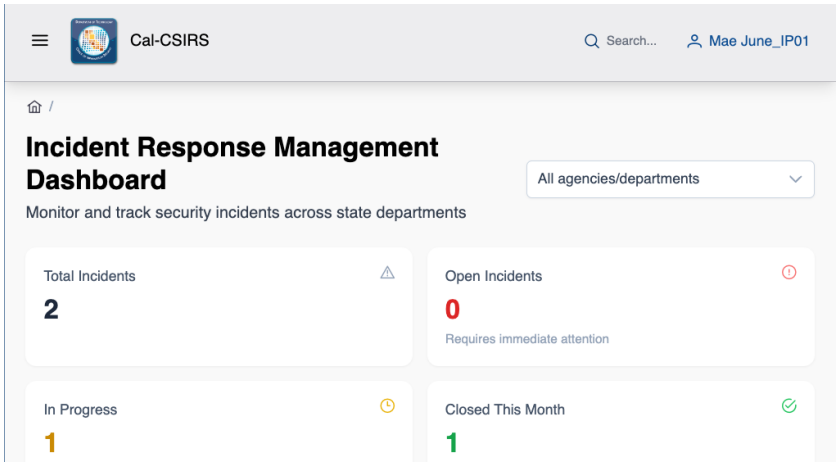

Figure 7: Incident Response Management Dashboard

2. **My Profile** displays account details such as name, email, system ID, and assigned roles and organizations.

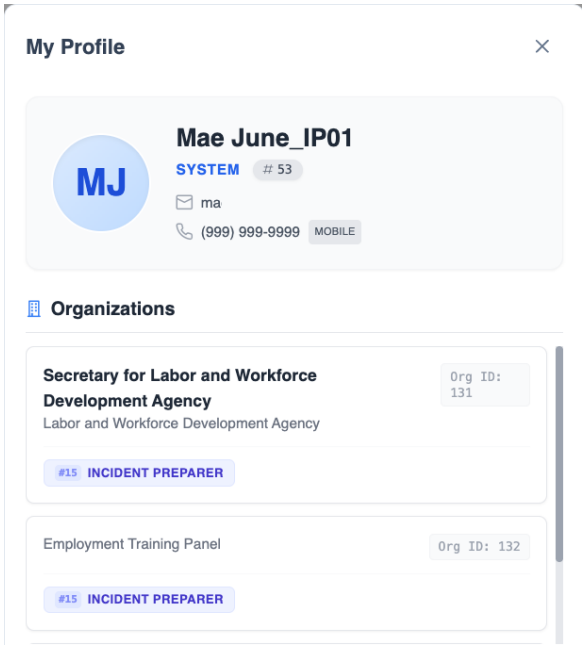

Figure 8: My Profile

3. To sign out and securely exit the dashboard when finished, select the **My Profile** dropdown from the user's name, then select **Sign out**.
    a. To update the password, select **Preferences**.

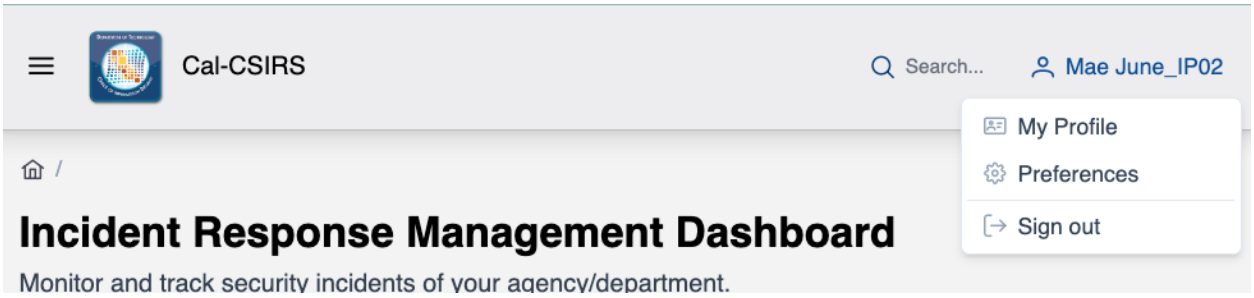

Figure 9: User's Name and Sign Out Option

Report a New Incident

1. Navigate to the **Incident Reporting module** by selecting the **hamburger icon (three horizontal lines)**, then **Incident Response Management** from the left navigation menu.
2. Then, select **Report New Incident**.

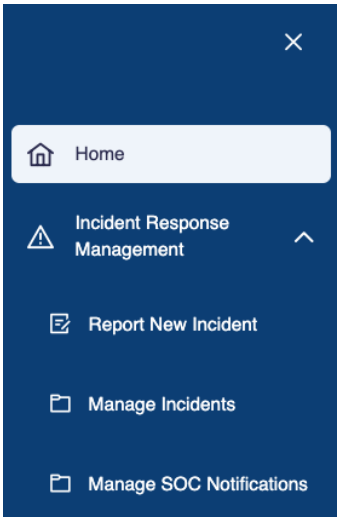

Figure 10: Navigation

3. Review the **Incident Report** form, which is divided into **Overview** and **Details** sections. Expand or collapse sections as needed using the **Expand All/Collapse All** buttons.
    - Overview
        i. General
        ii. Prepare User Information
        iii. Incident Information
        iv. Corrective Actions and Costs
    - Details
        i. Incident Type
        ii. Privacy

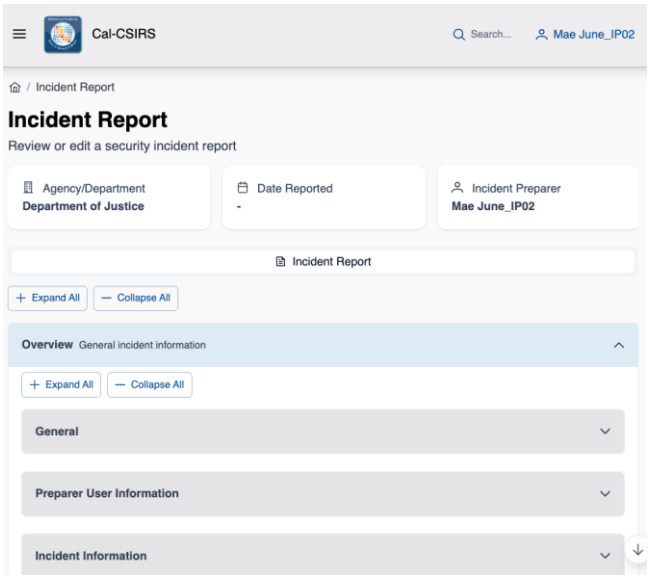

Figure 11: Incident Report Page

4. Complete all required fields marked within the form.
    - Required fields are marked with a red asterisk.
5. Select or hover over the information icon for additional guidance on specific fields.

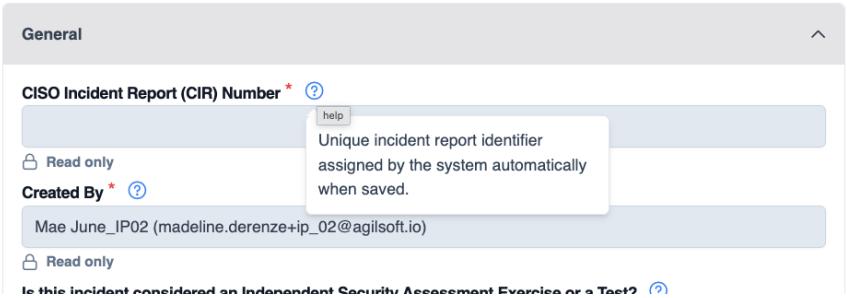

Figure 12: Incident Report – Tooltip / Information Icon

6. Attach supporting evidence if required, using the file upload functionality within specific sections of the form.

> **Tip:** Answering questions in a specific way may cause to additional questions to appear.

Save a New Incident Report Without Submitting

1. To complete the Incident Report without submitting it, scroll down to the bottom of the page and select **Save**.

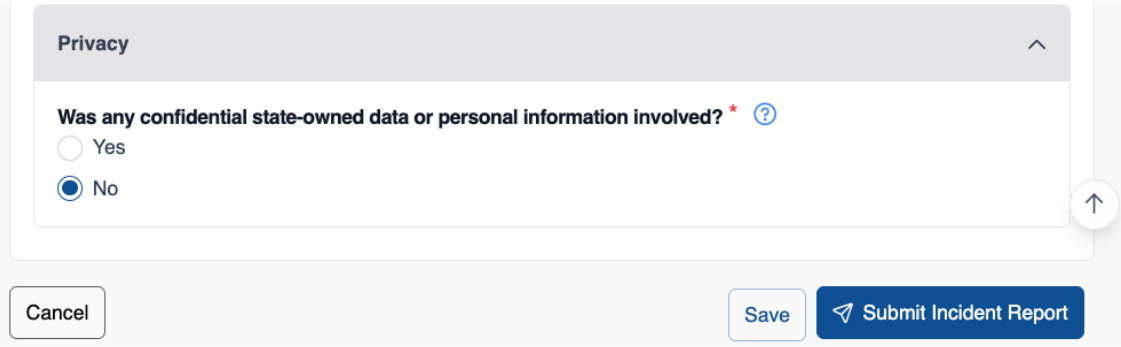

Figure 13: Incident Report - Save Button

   - If any required fields are missing information, an **Action Required** popup will display. Select the item to navigate to the field.

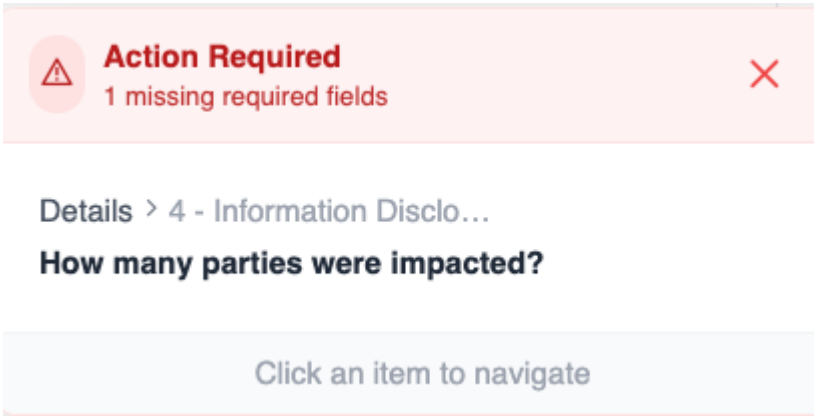

Figure 14: Incident Report - Action Required Validation Message

2. Once saved, an **Incident saved successfully** popup will appear.

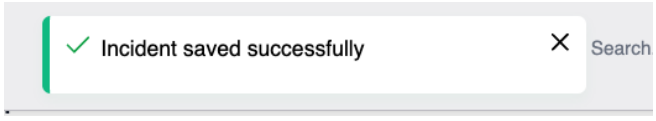

Figure 15: Incident Report - Successful Save Message

Submit a New Incident Report

1. To submit the Incident Report, select **Submit Incident Report.**
    a. Refer to the *Save a New Incident Report Without Submitting* section of this document if an Action Required popup appears.

Figure 16: Incident Report - Submit

2. The incident report will now be on the Manage Incidents page with a **Submitted** status.

Manage Existing Incident Records

1. Navigate to **Manage Incidents** from the left navigation menu.

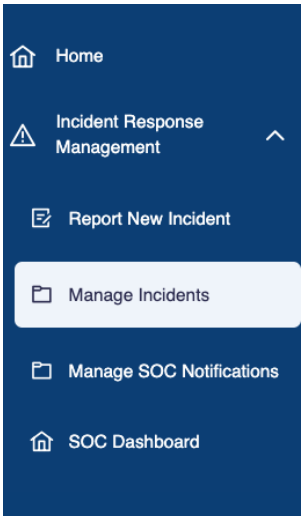

Figure 17: Navigation - Manage Incidents

2. Filter incident records as needed by selecting criteria at the top of the page such as agency, department, incident ID, type, assignee, status, or date range, then select **Apply**.
3. **Remove filters** and return to the full list by selecting **Show All**.

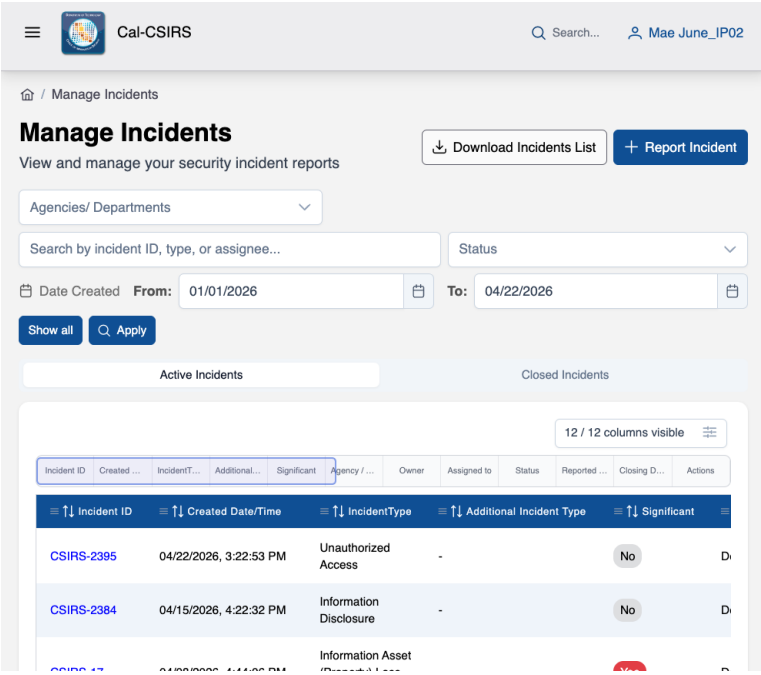

Figure 18: Manage Incidents Page

4. Sort the Active Incidents list by selecting any column header.
    a. To view incident reports that have been closed, select the **Closed Incidents** tab.
5. Use pagination controls at the bottom of the table to navigate between pages and adjust the number of records displayed per page.

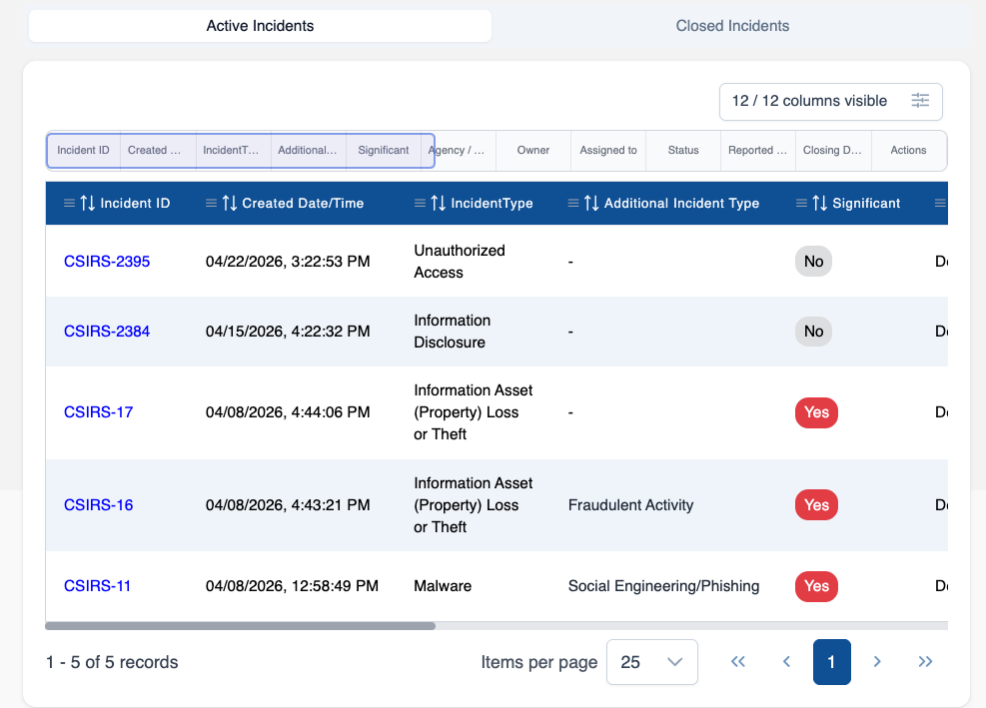

Figure 19: Active Incidents

6. Select an incident record to open it for updates, add notes, or make changes to details by scrolling to the left and selecting the **three dots** under Actions, then selecting **View**.

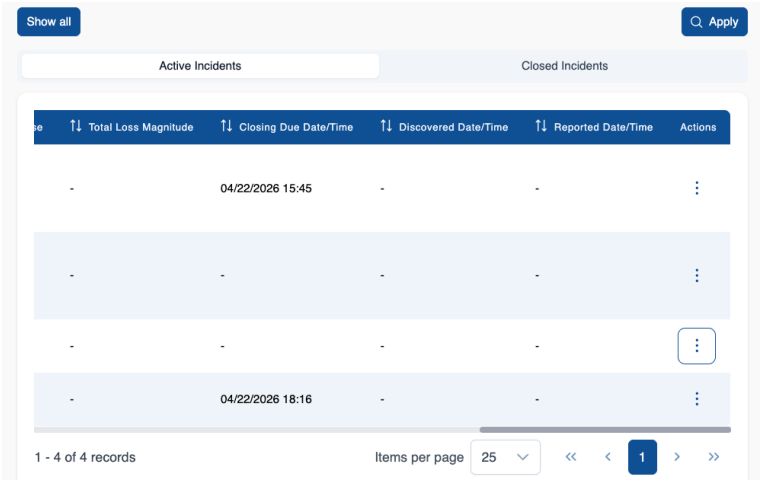

Figure 20: Active Incidents - Actions - View

> **Warning:** *Updates to the Incident Report are only permitted when the report status is Clarification Requested.*

Review a Clarification Submitted Incident

1. From the Manage Incidents page, locate your incident with the **Clarification Requested** status and select the **three dots**. Then select **Edit.**

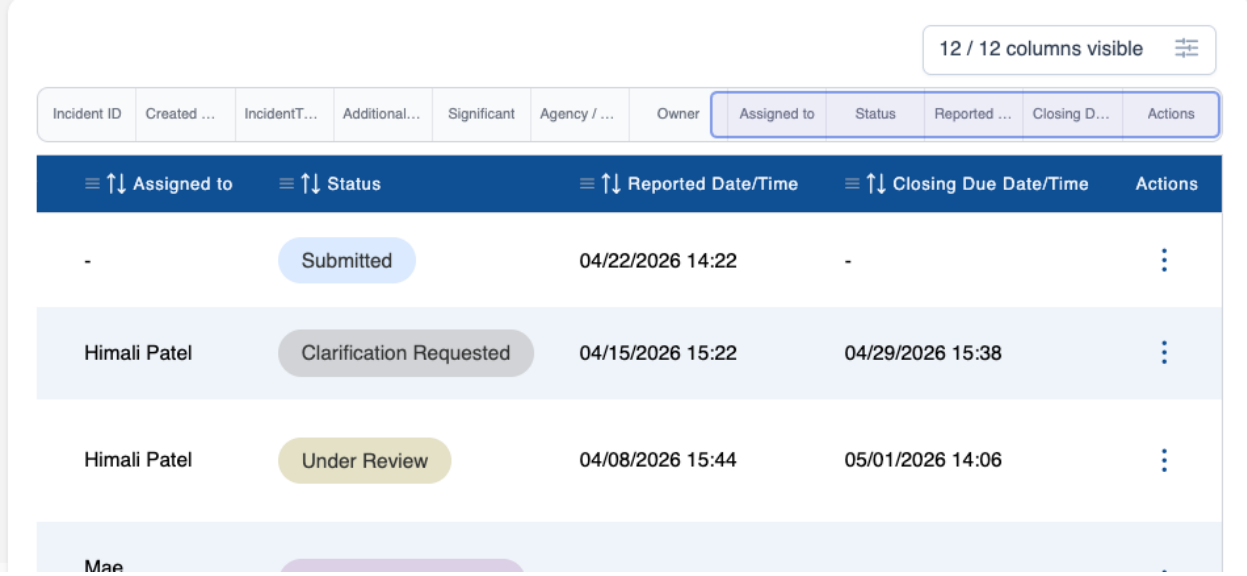

Figure 21: Clarification Requested

2. Review the **Notes** tab of the incident report to identify what clarification was requested.

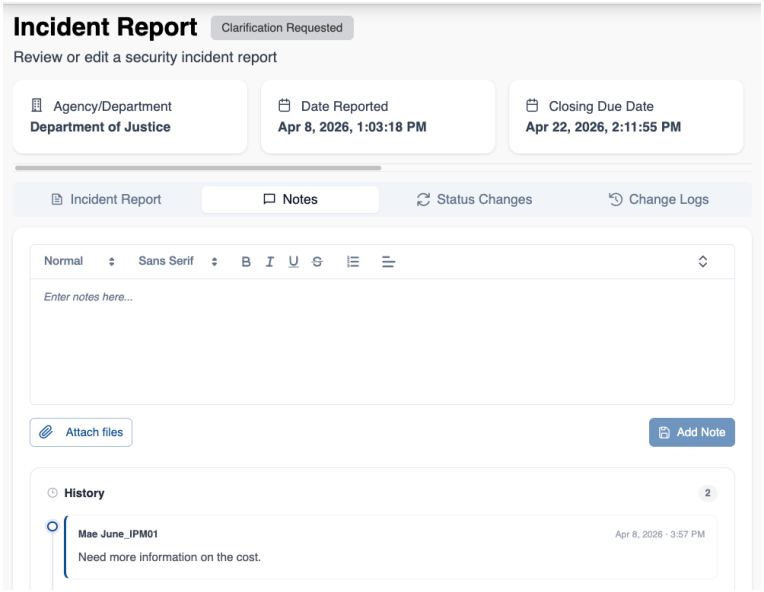

Figure 22: Notes

3. Make any updates to the Incident Report as necessary by selecting the Incident Report tab and adding the necessary information into the appropriate fields. The **Corrective Actions and Costs** section will now be required. Fill in the appropriate fields.

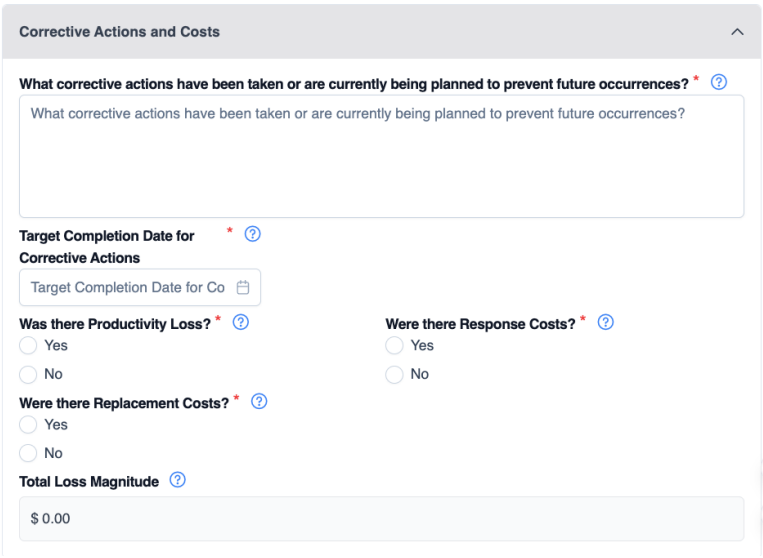

Figure 23: Corrective Actions and Cost

4. Update the Notes section to provide any additional clarifying information for the Incident Report Manager.
5. Once you are ready to submit, select either **Providing Clarification** or **Final Update and Submit.**
    a. Providing Clarification is a suitable status for an ongoing issue that has yet to be resolved.
    b. Final Update and Submit is a suitable status for an issue that is complete and no additional information can be added to the incident report.

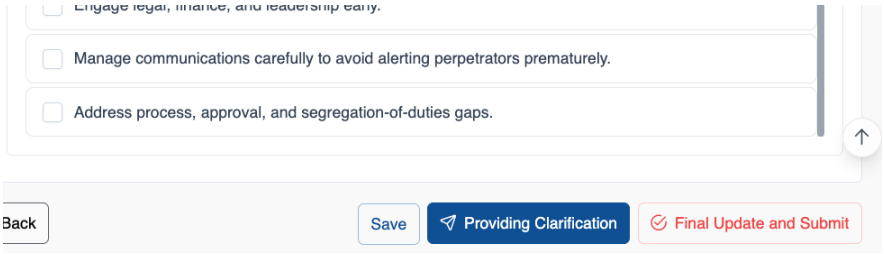

Figure 24: Providing Clarification or Final Update and Submit

> **Tip:** The Incident Report will cycle through statuses of Clarification Submitted and Clarification Requested until the report is complete and closed.

Questions

Questions regarding the use of this guide may be sent to:

California Department of Technology

Office of Information Security

Security@state.ca.gov