



User Guide

Version 1.02



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Chapter 1 About This Guide

The User Guide provides information about CAP (Compliance Assessment Professional) as well as instructions for performing compliance assessment related tasks.

The screen images presented in this guide are a close representation of the screens you will see in CAP.

1.1 Audience

The User Guide is directed to those users responsible for performing compliance assessments and audits.

1.2 Related Documents

The following document provides additional information related to using CAP and can be used in conjunction with this guide.

- Risk Asset Professional User Guide

1.3 Conventions

The following conventions are used throughout the User Guide.

1.3.1 Fonts


The following fonts have been used to notate Fields and Actions in CAP.

- **Fields:** Fields are **Bolded**.
- **Actions:** Actions, such as clicking on a link or button, are **Bolded**.
- **Dialogue Boxes:** Dialogue boxes are **Bolded** and *Italicized*.
- **Secondary Windows:** Features that open in secondary windows like Reports are **Bolded** and *Italicized*.

1.3.2 Notations

The following notations highlight information of special interest.

! **Important:** Calls attention to descriptions or procedures that are essential for proper operation.

 **Note:** Provides supporting information that may not be explicitly addressed in the accompanying text.

1.4 Technical Support

If you need technical assistance, please contact Docs2Comply using any of the following means:

Online: Support@Consult2Comply.com

Phone: +1 703 871 3950

Mail: 12801 Worldgate Drive
Suite 500
Herndon, VA 20170 USA

1.5 Document History

This table details changes made to the document during each revision.

Date	Type	Description
April 2008	Release	Initial Product Release May, 1 2008
May 2008	Update	Minor changes and feature updates

Chapter 2 Getting Started

This chapter provides information and instructions for installing CAP, adding and changing your logo, setting the start-up file path, entering data, and navigating CAP.

2.1 Installing CAP for the First Time

Before you begin using CAP you will need to install the software onto your computer. If you have already installed the software, jump ahead to 2.2 Customizing CAP.

! Important: CAP requires Java JRE (Java Runtime Environment) version 1.5.0.12 or higher. To download the latest Java version, go to <http://www.java.com/en/download/manual.jsp>. The java download is free to all users.

Note: You can check to see if Java is currently installed on your machine) by performing the following check. This check is for Microsoft platforms users only.

- Go to the Start Menu and select **Run**.
- Type in “cmd”. This is the command for command window.
- Type “Java –version”. This will determine if and what version of Java is installed on your machine.

To install CAP, complete the following steps:

1. After purchase, you will receive an email with a CAP .msi (Microsoft Installer) program installer to aid in installation. .

The **File-Download – Security Warning** dialogue box opens.

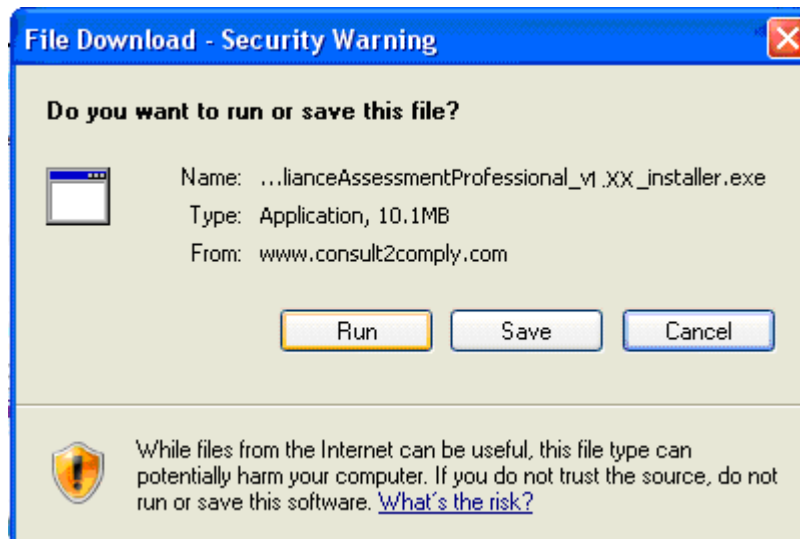



Figure 1: File Download – Security Warning Dialogue Box

2. Click **Run**.

-  **Note:** You can also **Save** the install link to your local machine.
- Select the location where you would like to save the Windows Installer Package, and then click **Save**.
 - Once saved, the download begins. The process indicator tells you when the download is complete.
3. The Installer application will begin the installation process.

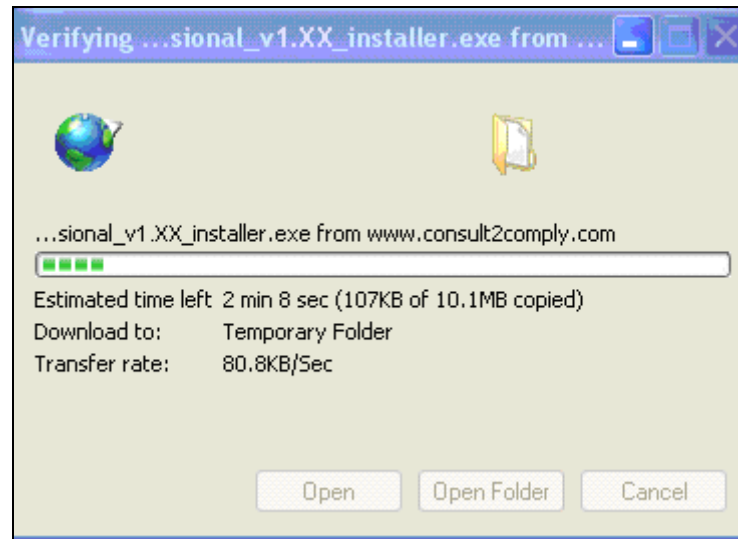


Figure 2: Installation Process

4. At the completion, a Windows Security Window may appear asking if you would like to run the application. Click **Run**.

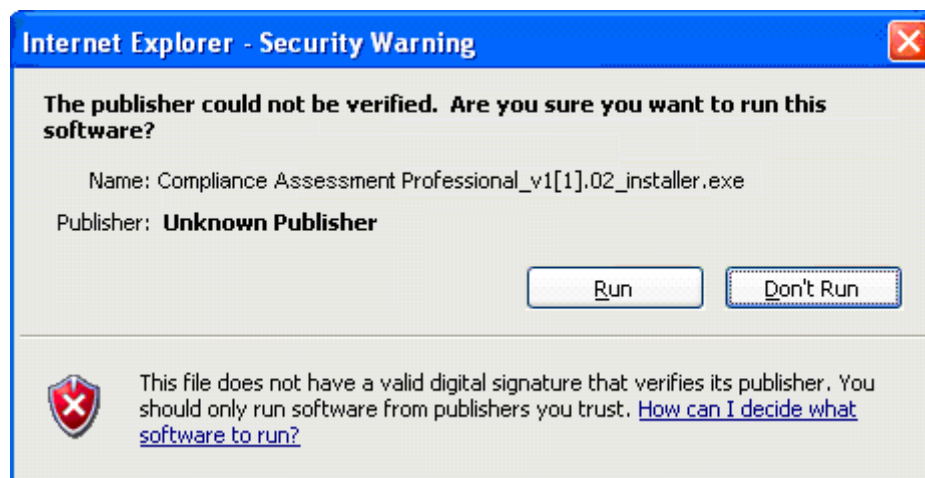


Figure 3: Security Windows Warning Example

5. The **CAP Setup Wizard** opens



Figure 4: CAP Setup Wizard

6. Click **Next**.

The *CAP Setup Wizard* displays the End-User License Agreement.

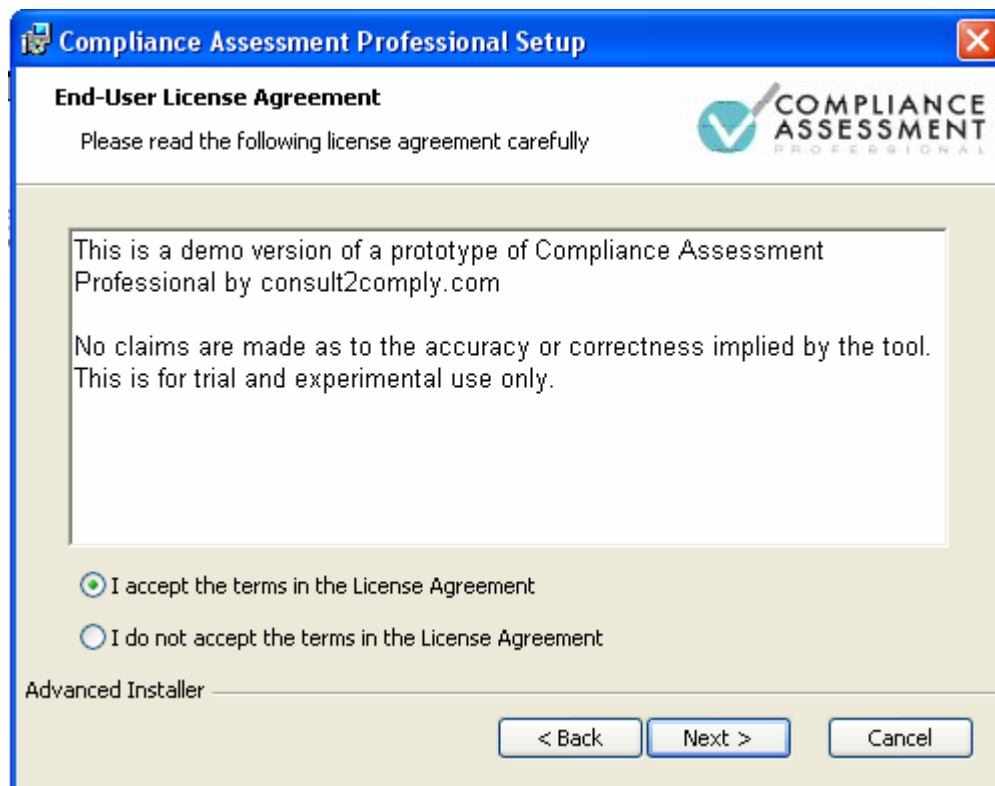


Figure 5: Accepting End-User License Agreement

7. Select **I accept the terms in the License Agreement**, and then click **Next**.

The *CAP Setup Wizard* displays the installation folder selection.

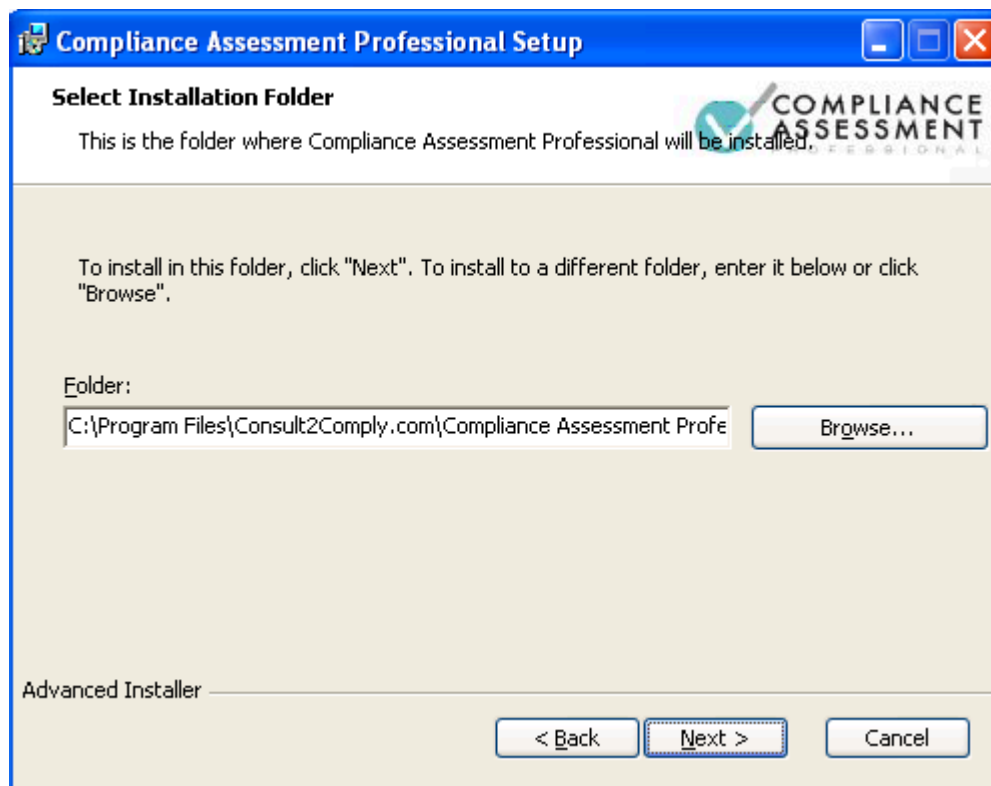



Figure 6: Selecting an Installation Folder

 **Note:** If you would like to install CAP to a location other than the default location shown in the figure above, do the following:

- Enter the folder location, and then click **Next**.
 - OR-
 - Click **Browse**
 - Select a new location, and then click **OK**.
 - Click **Next**.
8. To install CAP in the default location, click **Next**.

The **CAP Setup Wizard** displays shortcut configuration options.

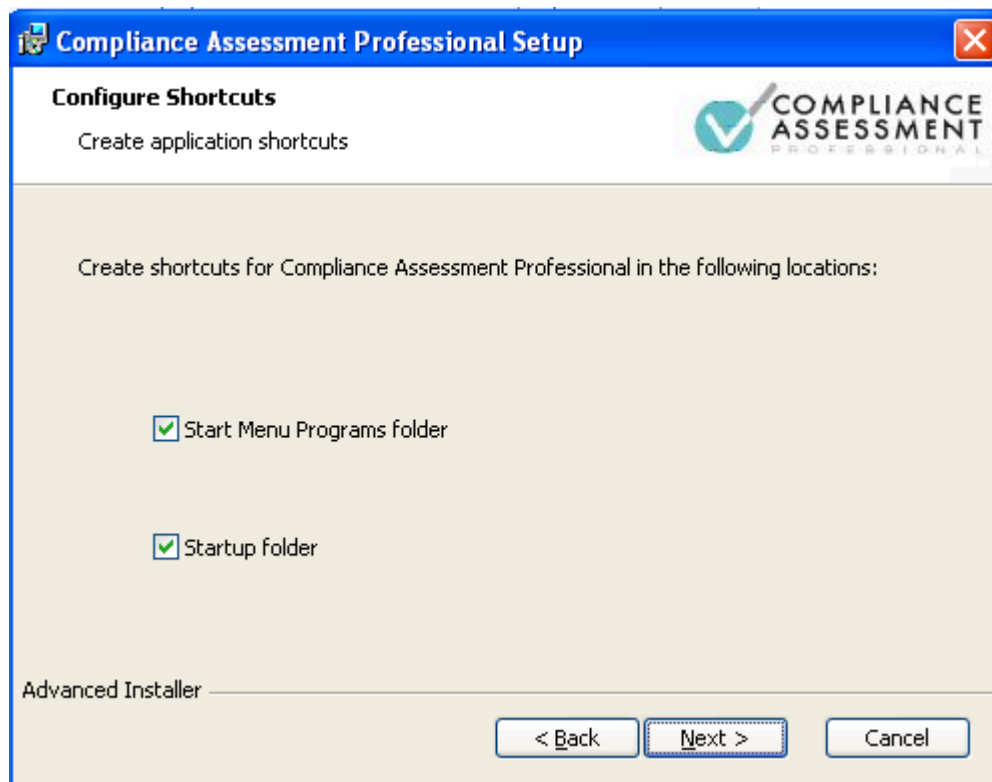


Figure 7: Configuring Shortcuts

9. Deselect any shortcut options as desired, and then click **Next**.
CAP is ready to be installed.
10. Click **Install**.

See the following figure for an example.

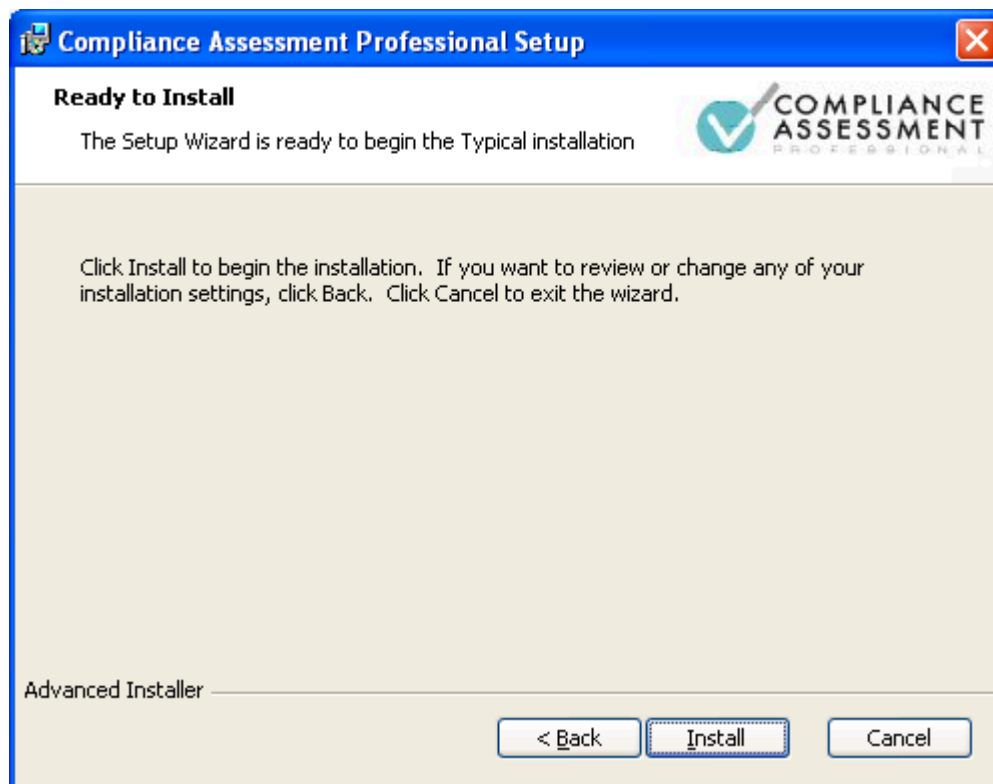


Figure 8: Ready to Install CAP

11. Optional. Deselect "Launch CAP" if you would not like to run CAP at this time.
12. Click **Finish**.
See the following figure for an example.

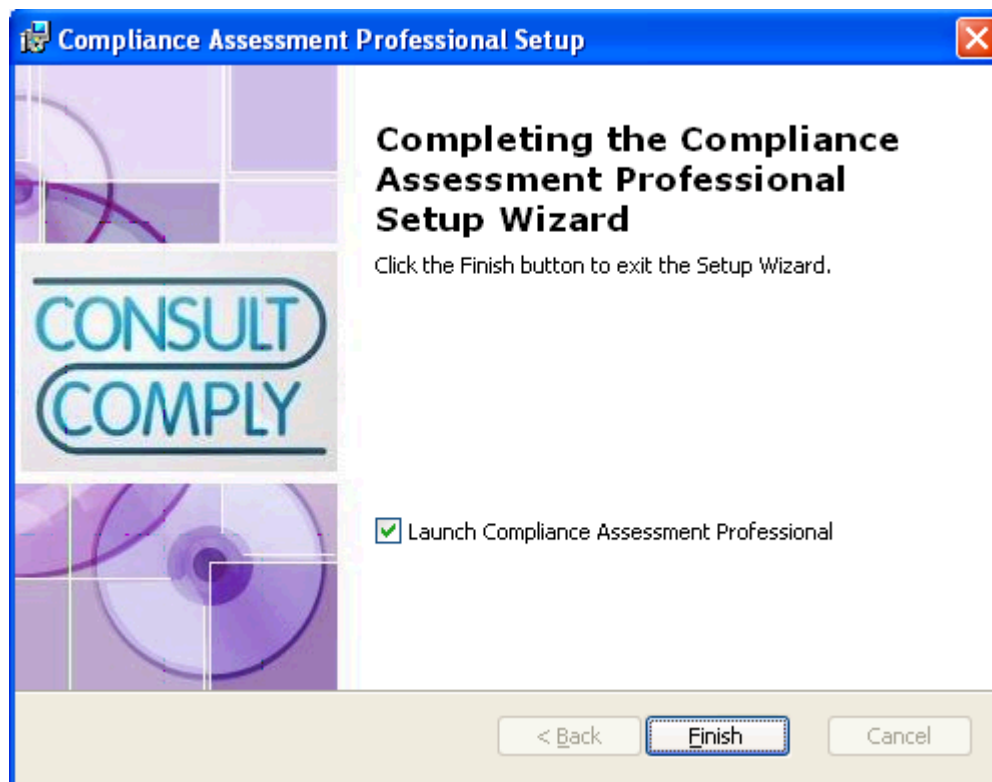


Figure 9: Completing the CAP Setup Wizard / Launching CAP

! **Important:** If you are launching CAP for the first time or if your license has expired, you will be prompted to enter a valid license key. See the following figure and remaining step for more information.

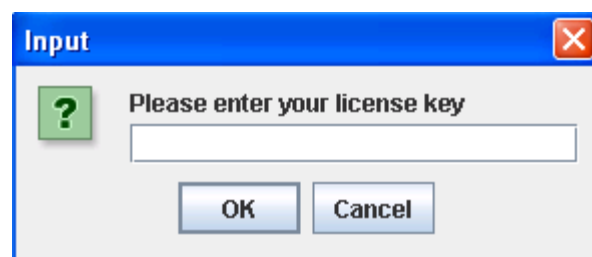


Figure 10: Entering License Key

13. Enter your license key, and then click **OK**.

2.2 Customizing CAP

CAP has many features that configurable by the tool user. A list of items that can be customized:

- **Logo** – you can upload a custom logo to CAP. See section 2.2.1 for more information and instructions.

- **Start Up File Path** – you can set the start up file path. See section 2.2.2 for more information and instructions.
- **Preferences Files** – you can save and load your preferences files as well as restore default settings. See section 2.2.2.2 for more information and instructions.
- **Answers** – you can use the Answers Editor to add, edit and remove answers available in RAP for compliance assessment questions. See section 2.2.2.3 for more information and instructions.
- **User Information** – you can use the User Information Editor to add, edit and remove user information. See section 2.2.2.4 for more information and instructions.

2.2.1 Adding / Changing Logos

You can add a new logo or change your existing logo that displays in CAP.

To do add or change your logo, complete the following steps.

1. Right-click the logo image, and then select **Change Logo Image**.

See the following figure for an example.

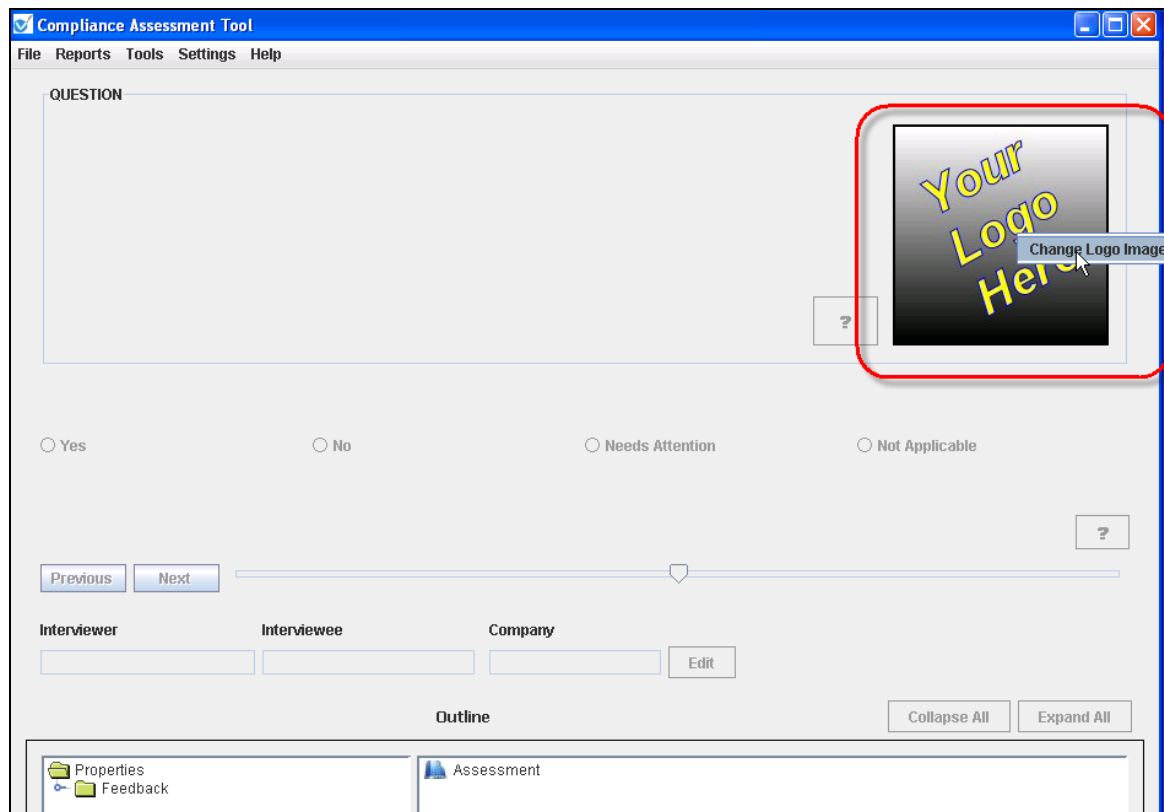


Figure 11: Adding / Changing Logo

The **Open** dialogue box opens, which allows you to select a logo file.

See the following figure for an example.

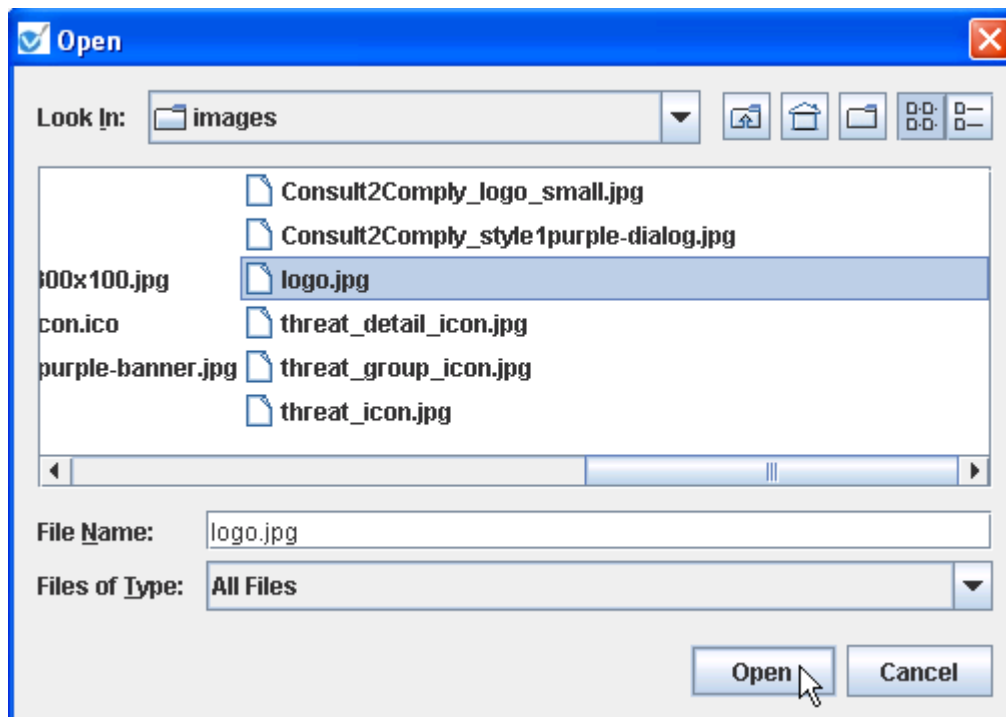



Figure 12: Open Dialogue Box - Selecting a File

2. Select the file containing your logo, and then click **Open**.

The new logo displays.

 **Note:** To cancel this action and close the dialogue box, click **Cancel**.

! **Important:** Only JPEG files can be used to add or change the logo that displays in CAP. If you open another file type, the image will not display.

2.2.2 Settings and Preferences

You can customize the way you work by using the Settings and Preferences feature in CAP. The following subsections provide information and instructions for setting the start-up file path, creating and saving your custom settings / preferences to a file, loading your saved preferences, quickly and easily restoring default settings, and editing answers and user information.

To change settings and preferences, complete the following steps.

1. From the **Settings** menu, select **Preferences**.

The **Preferences** dialogue box opens.

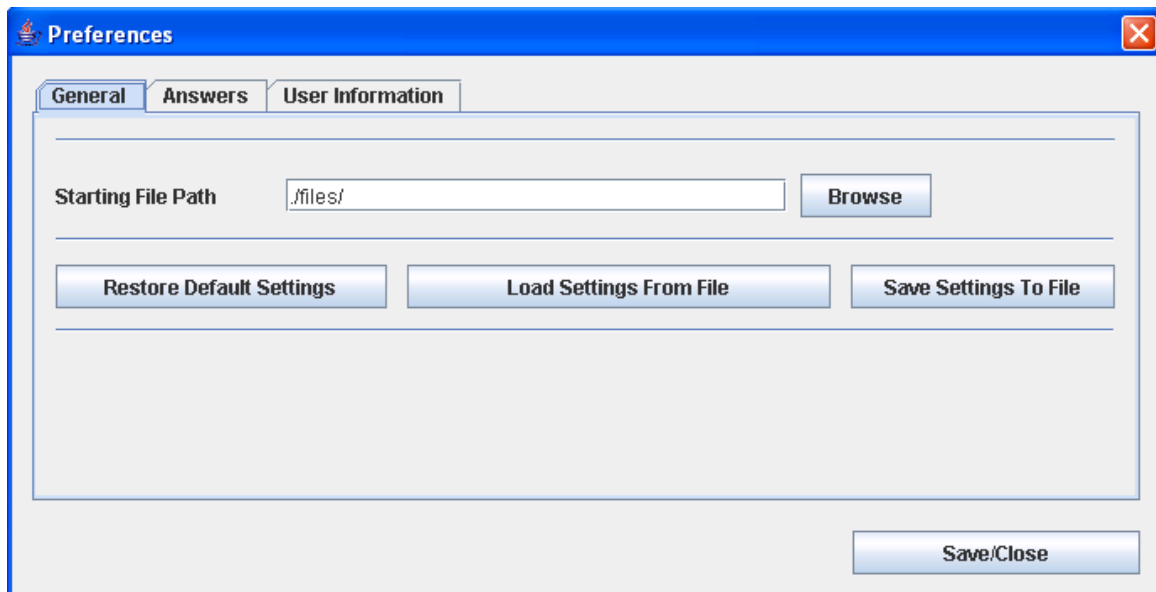


Figure 13: Preferences Dialogue Box

- To set the start up file path, see section 2.2.2.1.
- To save, load or restore settings, see section 2.2.2.2.
- To edit answers, see section 2.2.2.3.
- To edit user information, see section 2.2.2.4.

2.2.2.1 Start Up File Path

You can customize the way you work by using the settings feature in CAP. The settings feature saves you time by allowing you to set the default directory that CAP points to when you open and save assessments.

To set the startup file path, complete the following steps:

1. From the General tab of the **Preferences** dialogue box, click **Browse**.

See the following figure for an example.

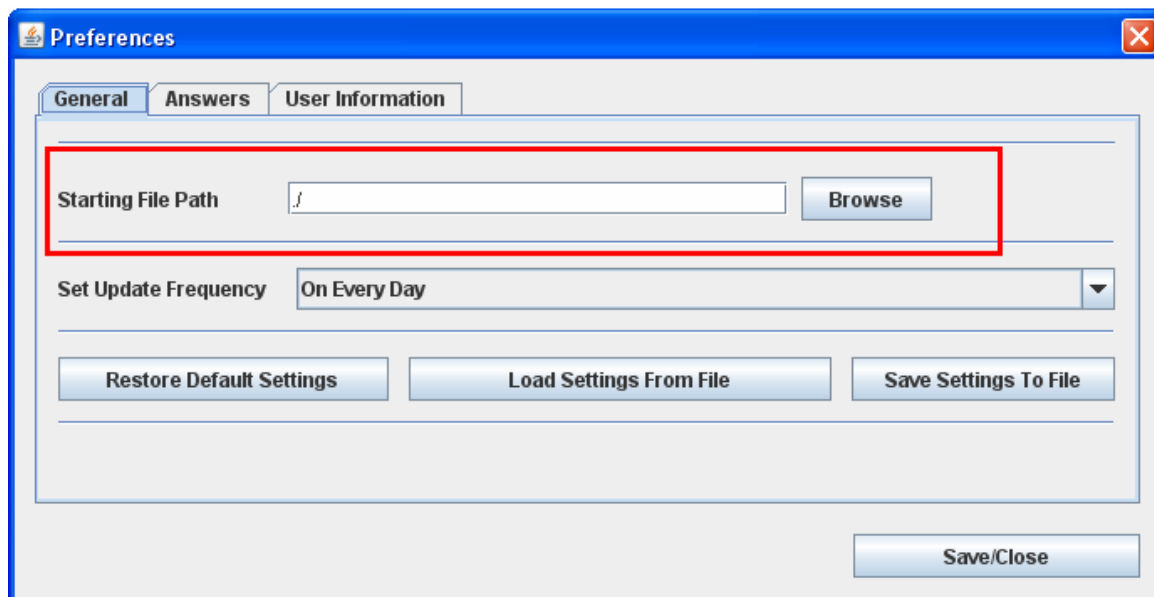


Figure 14: Setting Start-up File Path

The **Select Starting File Path** dialogue box opens.

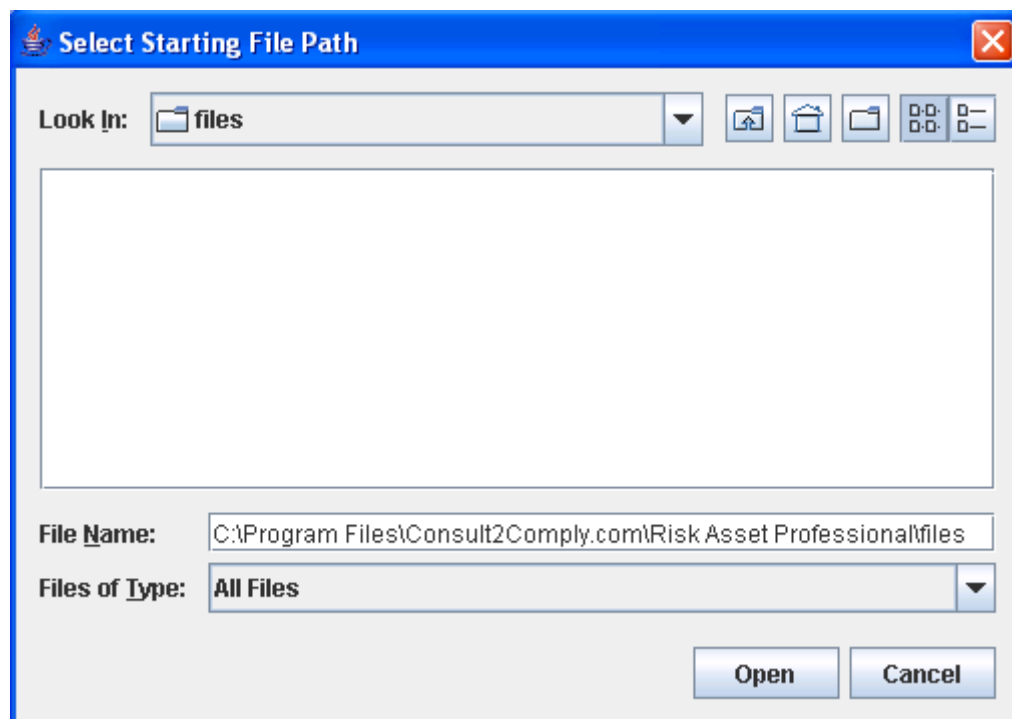


Figure 15: Selecting a Starting File Path

2. Select or enter the start-up path you prefer, and then click **Open**.
3. Click **Save/Close** to save the default file path and close the dialogue box.

2.2.2.2 Saving / Loading / Restoring Custom Preference File

You can save your custom settings and preferences, load saved settings and preferences files, and restore default settings – all using the Settings and Preferences feature. The following actions are available from the General tab of the **Preferences** dialogue box.

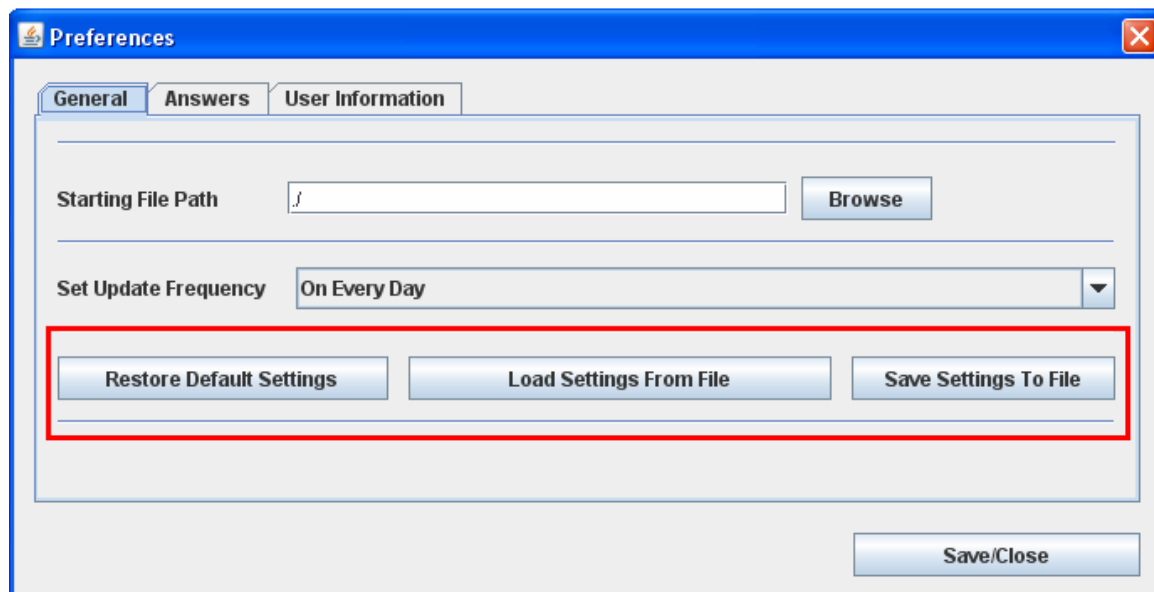


Figure 16: Preferences Dialogue Box – General Tab

Restore Default Settings – a quick way to return to the original RAP program settings. By restoring the default settings, you are resetting the drop-down values, logo image and asset properties.

To restore default settings, complete the following steps.

1. From the General tab of the **Preferences** dialogue box, click **Restore Default Settings**.
2. Click **Yes** to confirm change.

! Important: Remember to select the “**Save/Close**” button after making any settings changes.

Save Settings and Preferences – allows you to save your custom settings and preferences to a file.

To save your settings and preferences, complete the following steps.

1. From the General tab of the **Preferences** dialogue box, click **Save Settings to File**.
2. Enter the file name.
3. Select a location where you would like to save your preferences file, and then click **Save**.

! Important: Remember to select the “**Save/Close**” button after making any settings changes.

Load Your Settings and Preferences – You can load your custom settings and preferences at any time by opening the desired custom settings file.

To load your customer settings and preferences, complete the following steps.

1. From the General tab of the **Preferences** dialogue box, click **Load Settings From File**.
2. Click **Yes** to confirm change.

! **Important:** Remember to select the “**Save/Close**” button after making any settings changes.

2.2.2.3 Editing Answers

The Answer Editor feature provides you with the ability to customize the answers that appear when working on an assessment in CAP.

To edit answers, complete the following steps.

! **Important:** If you have an assessment open, save your changes before editing answers.

1. From the Answers tab of the **Preferences** dialogue box, click **Open Answer Editor**.

See the following figure for an example.

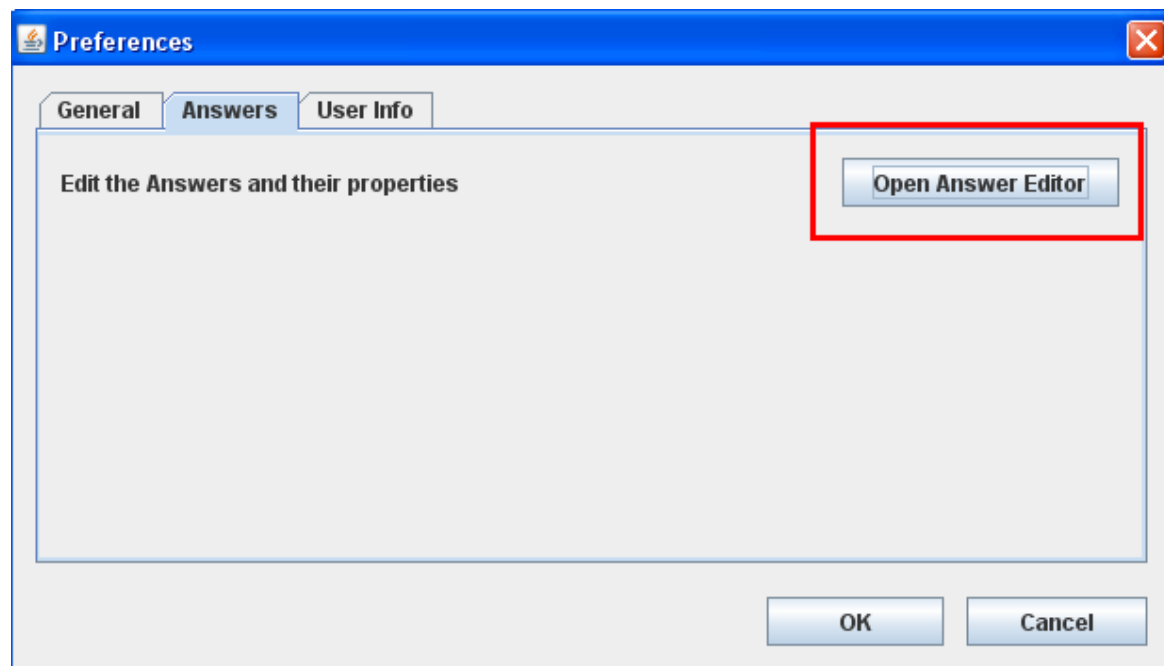


Figure 17: Editing Answers

The **Answer Editor** dialogue box opens.

See the following figure for an example.

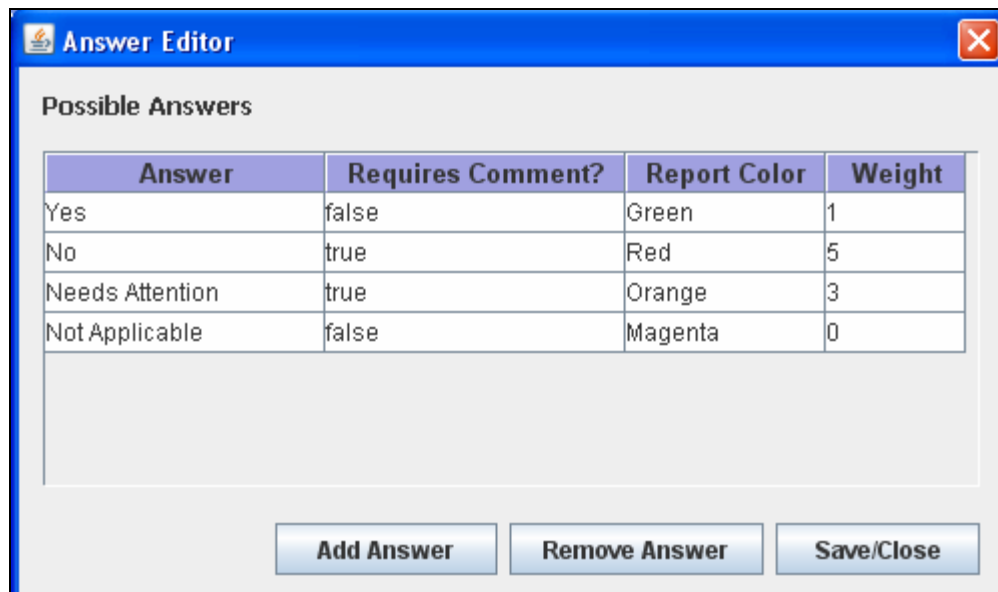


Figure 18: Answer Editor Dialogue Box

- To add answers, see 2.2.2.3.1 Adding Answers.
- To change answers, see 2.2.2.3.2 Changing Answers.
- To remove answers, see 2.2.2.3.3 Removing Answers.

2.2.2.3.1 Adding Answers

To add an answer, complete the following steps:

1. Follow the instructions in section 2.2.2.3 Editing Answers.
2. Click **Add Answer**.

A new answer is added to the Possible Answers table.

See the following figure for an example

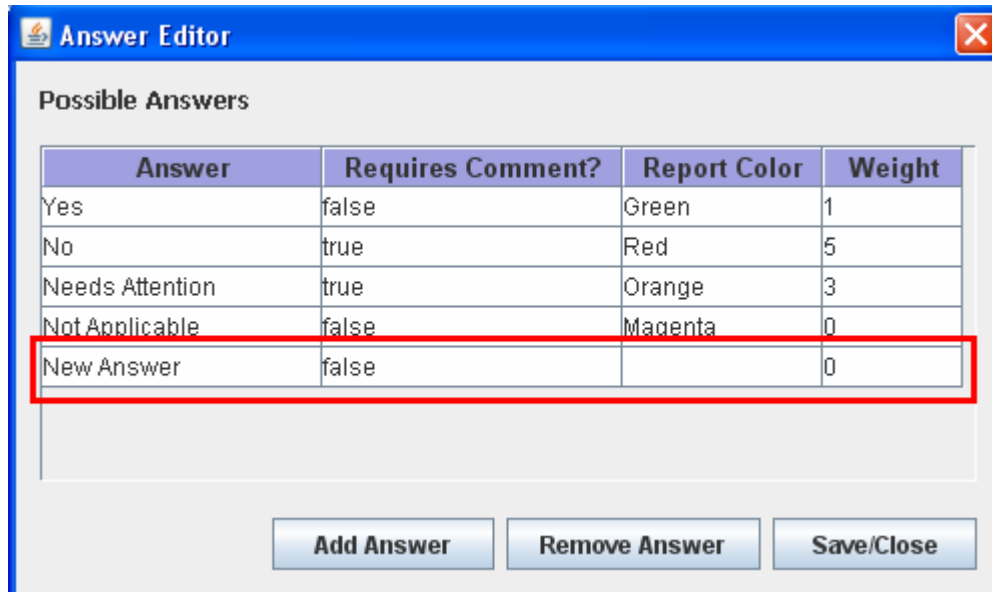


Figure 19: New Answer Row Added

3. Enter information into the **Answer**, **Requires Comment?**, **Report Color** and **Weight** cells of the New Answer row.


The following table provides information to help you complete these cells.

Editing Answers - Possible Answers Table			
Cell Name	Description and Valid Values		
Answer	Text.		
Req. Comment?	List. Valid values: <ul style="list-style-type: none"> • True • False 		
Report Color	List. Valid values: <table style="width: 100%; border: none;"> <tr> <td style="vertical-align: top;"> <ul style="list-style-type: none"> • Black • Cyan • Gray • Magenta • Orange </td> <td style="vertical-align: top;"> <ul style="list-style-type: none"> • Pink • White • Red • Yellow </td> </tr> </table>	<ul style="list-style-type: none"> • Black • Cyan • Gray • Magenta • Orange 	<ul style="list-style-type: none"> • Pink • White • Red • Yellow
<ul style="list-style-type: none"> • Black • Cyan • Gray • Magenta • Orange 	<ul style="list-style-type: none"> • Pink • White • Red • Yellow 		
Weight	Numeric characters. Valid values: 1 to 100		

Repeat the steps in this section to add additional answers.

4. When finished entering answer information, click **Save/Close**.

Changes are saved to your current working file.

 **Note:** If you would like to save changes to your custom settings file, see section 2.2.2.2 for instructions.

2.2.2.3.2 Changing Answers

To change an answer, complete the following steps.


1. Follow the instructions in section 2.2.2.3 Editing Answers.
2. Double-click into any cell to modify answer details.

The following table provides information to help you make changes to these cells.

Editing Answers - Possible Answers Table	
Cell Name	Description and Valid Values
Answer	Text.
Req. Comment?	List. Valid values: <ul style="list-style-type: none"> • True • False
Report Color	List. Valid values: <ul style="list-style-type: none"> • Black • Cyan • Gray • Magenta • Orange • Pink • White • Red • Yellow
Weight	Numeric characters. Valid values: 1 to 100

3. When finished editing the answer information, click **Save/Close**.

Changes are saved to your current working file.

 **Note:** If you would like to save changes to your custom settings file, see section 2.2.2.2 for instructions.

2.2.2.3.3 Removing Answers

To remove an answer, complete the following steps:

1. Follow the instructions in section 2.2.2.3 Editing Answers.
2. Click into any cell from the row of the answer you want to remove, and then click **Remove Answer**.

See the following figure for an example.

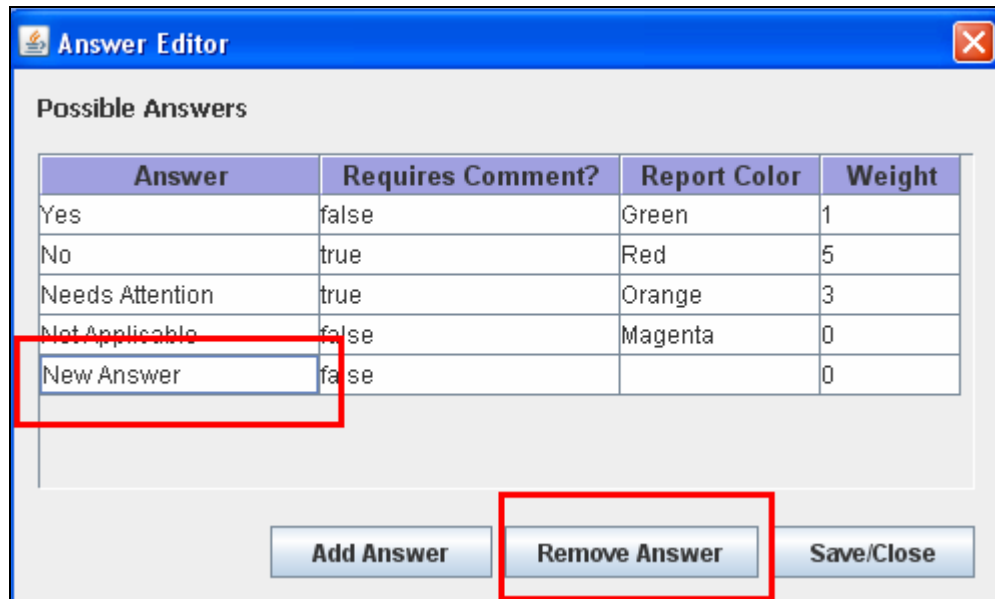



Figure 20: Removing an Answer

The selected answer is removed from the Possible Answers table.

3. When finished editing the answer information, click **Save/Close**.

Changes are saved to your current working file.

 **Note:** If you would like to save changes to your custom settings file, see section 2.2.2.2 for instructions.

2.2.2.4 Editing User Information

The Setting and Preferences feature in CAP provides you with the ability to customize user information that will appear when working on an assessment in CAP.

To edit user information, complete the following steps:

1. From the User Information tab of the **Preferences** dialogue box, click **Open User Info Editor**.

See the following figure for an example.

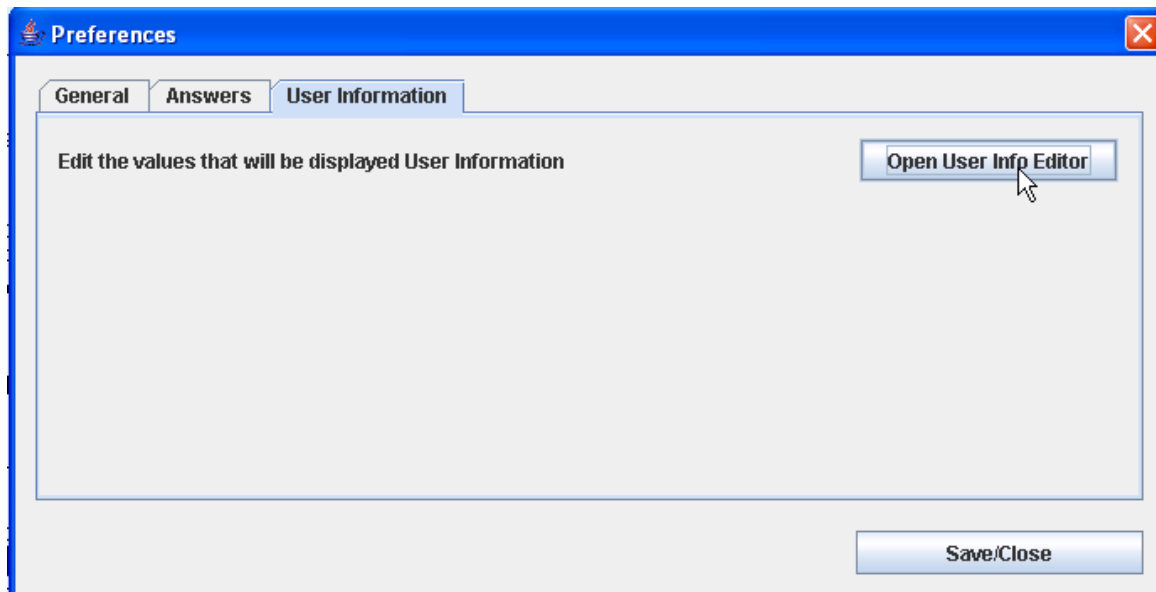


Figure 21: Opening the User Info Editor

The following table details the types of users in CAP.

Types of Users (Property Names)	
Company	The company or list of companies where Assessment(s) are being performed.
Interviewer	The person conducting the Assessment(s).
Interviewee	The people who are responsible for Answering the Assessment questions

The **Property Names** drop-down field lists the user type options.

See the following figure for an example.

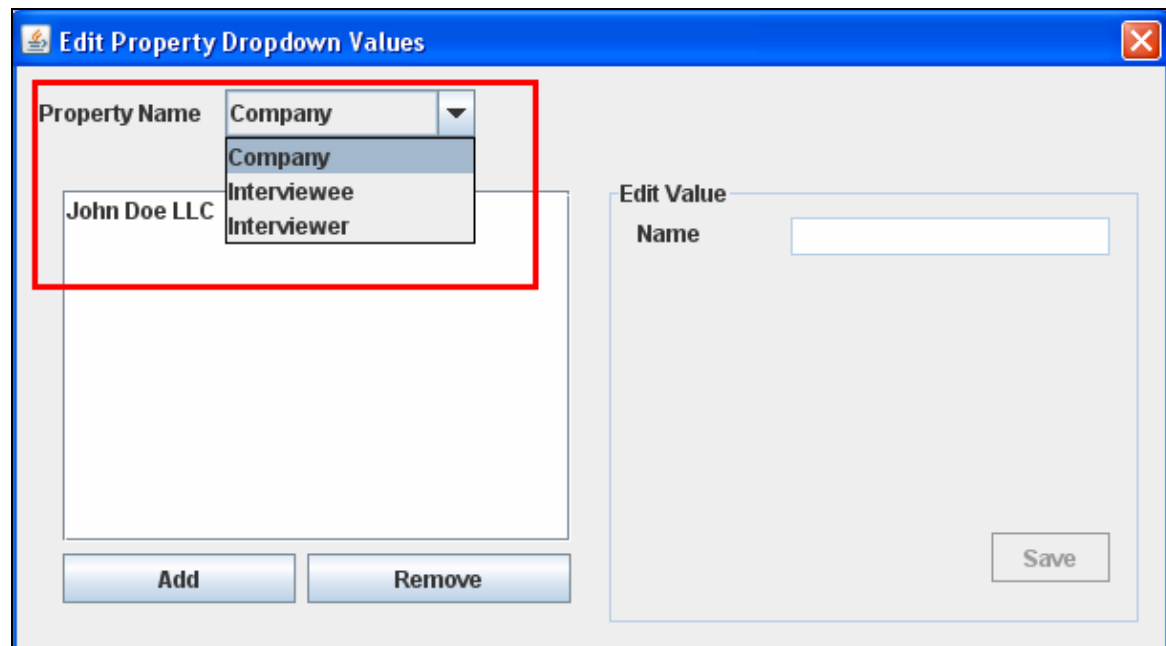


Figure 22: Edit Property Dropdown Values / Property Name Field

- To change existing user information, see section 2.2.2.4.1.
- To add users, see section 2.2.2.4.2.
- To remove users, see section 2.2.2.4.3.

2.2.2.4.1 Changing Users

To change the details of an existing user, complete the following steps.

1. Select the user type from the **Property Name** field.
2. Select the user that you want to change.

See the following figure for an example.

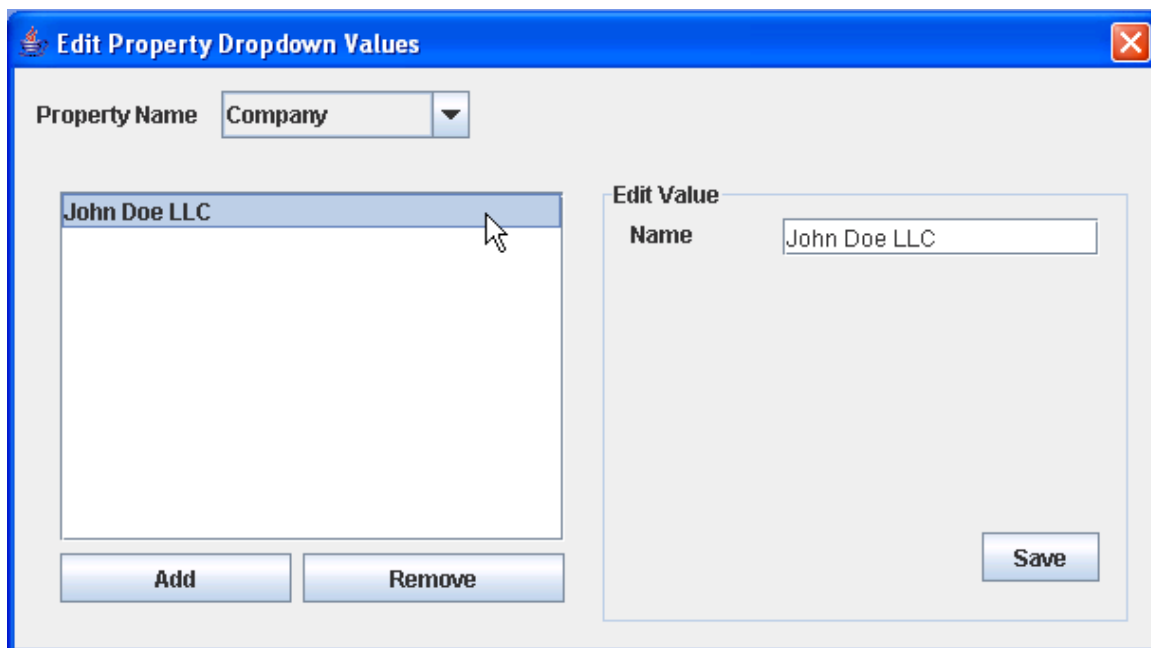


Figure 23: Selecting a User

3. From the **Name** field, make changes, and then click **Save**.

See the following figure for an example.

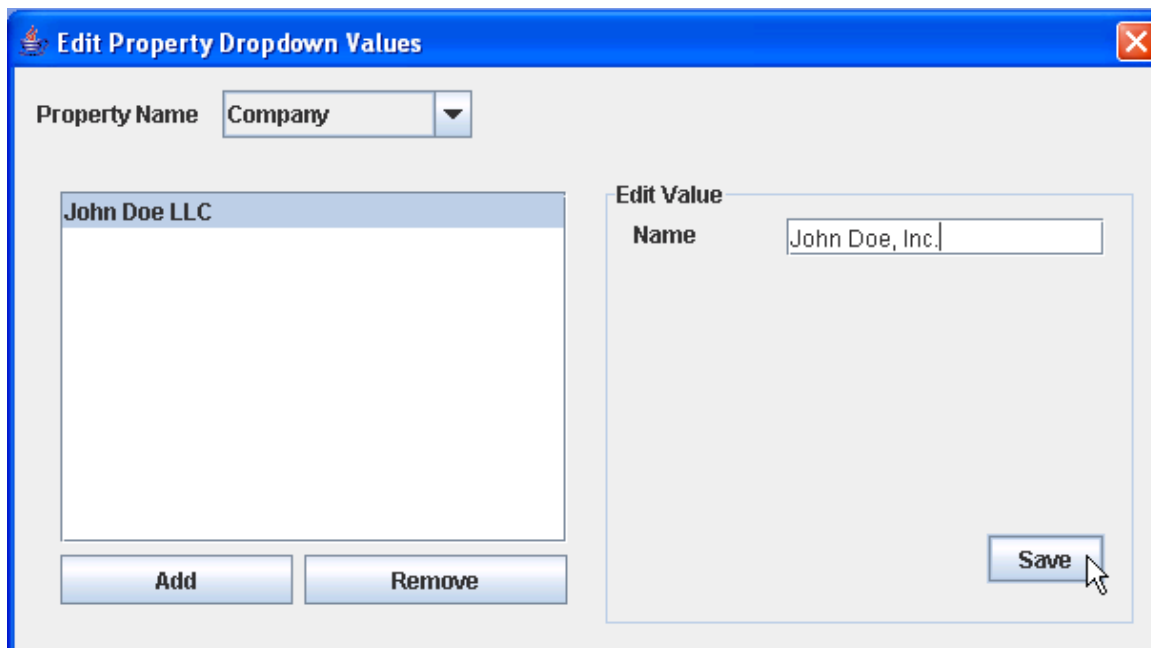


Figure 24: Changing User Information

4. To change the details of another user, repeat each step listed above. Otherwise, close the **Edit Property Dropdown Values** dialog box, and then click **Save/Close** from the **Preferences** dialog box.

2.2.2.4.2 Adding Users

To add users, complete the following steps.

1. Select the type of user from the **Property Name** field.
2. Click **Add**.

The new user is added.

See the following figure for an example.

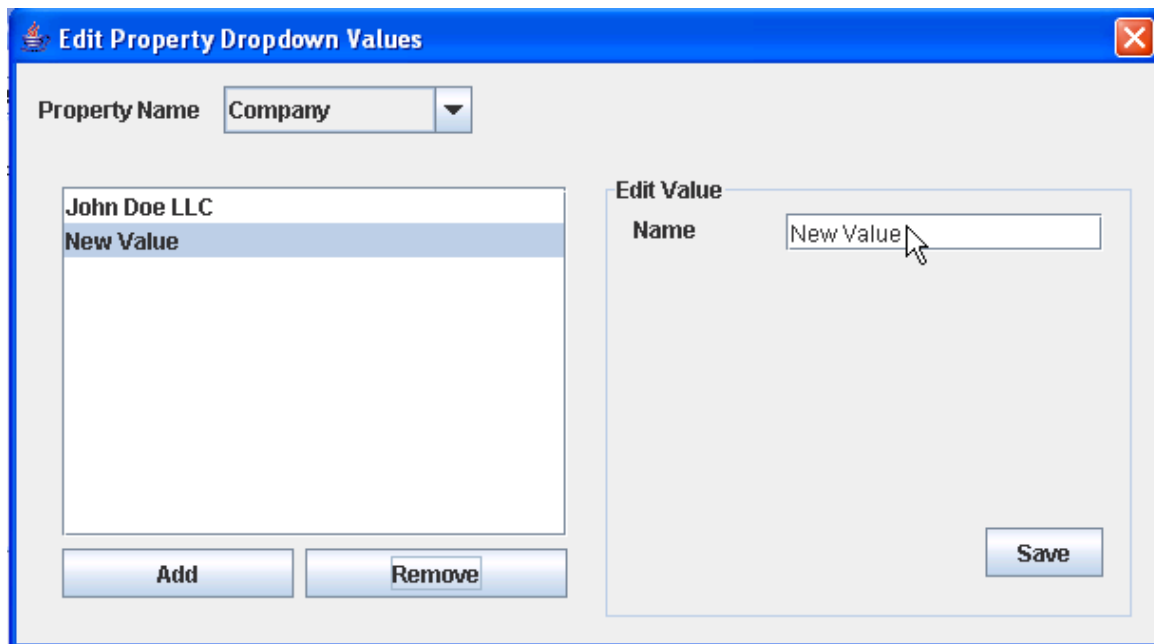


Figure 25: Newly Added User

3. From the **Name** field, replace "New Value" with the new user name, and then click **Save**.

See the following figure for an example.

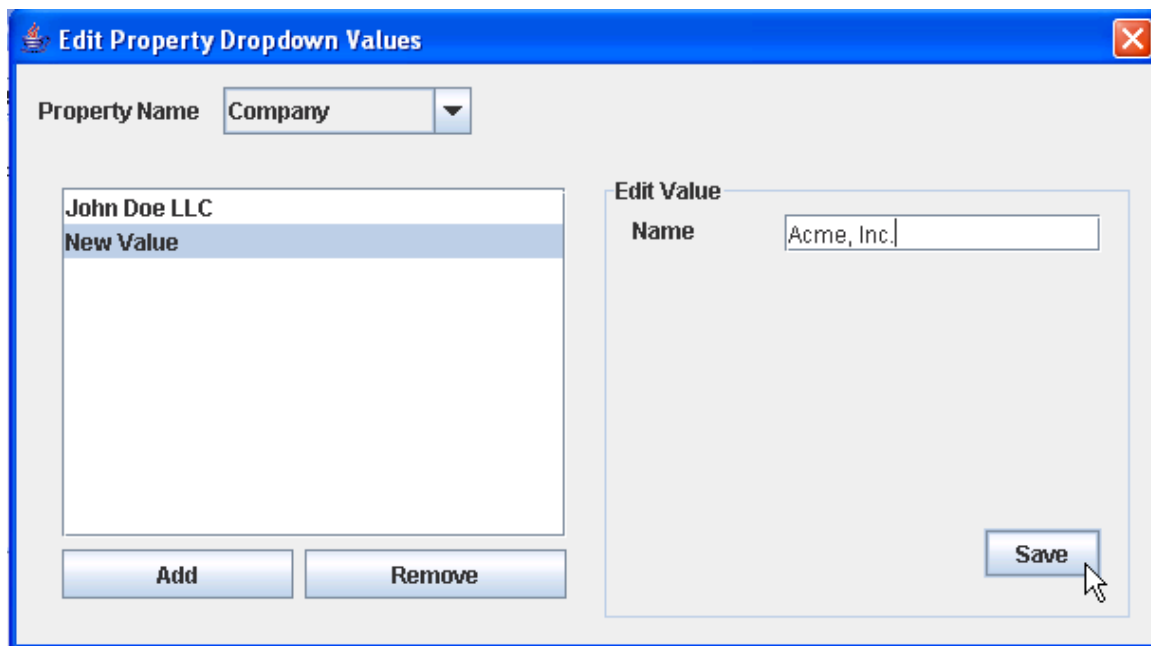


Figure 26: Adding a New User

4. To add additional users, repeat each step listed above. Otherwise, close the **Edit Property Dropdown Values** dialogue box, and then click **Save/Close** from the **Preferences** dialogue box.

2.2.2.4.3 Removing Users

To remove an existing user, complete the following steps.

1. Select the user type from the **Property Name** field.
2. Select the user that you want to remove.

See the following figure for an example.

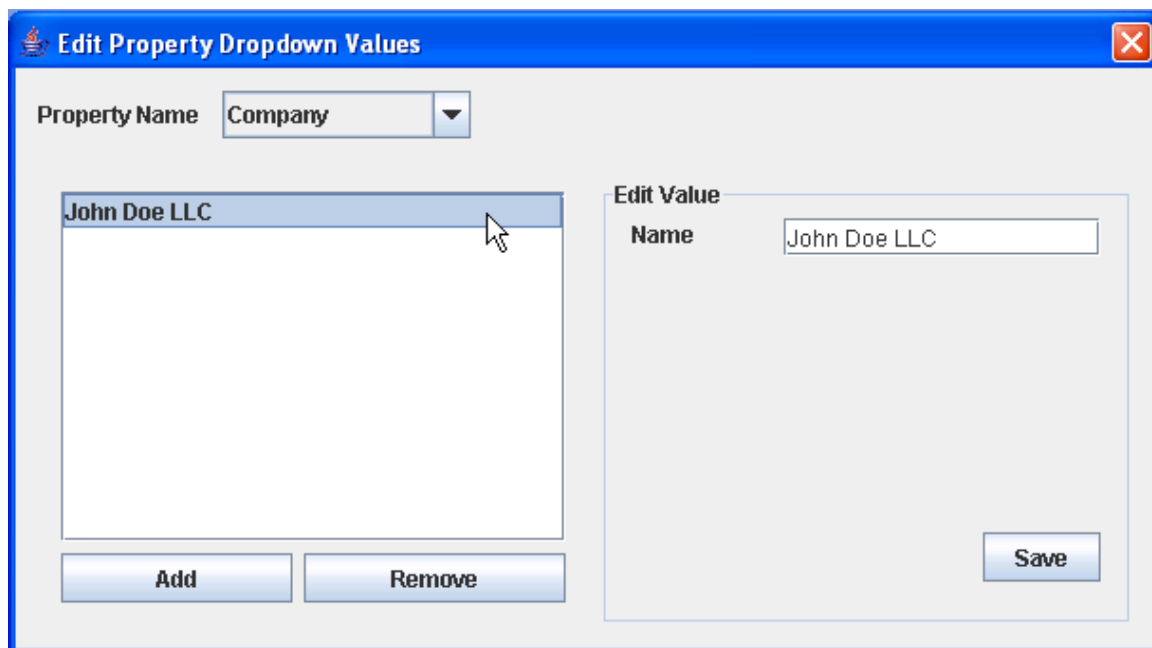


Figure 27: Selecting a User

3. Click **Remove**.
The user is removed from the list of users.
4. To remove another user, repeat each step listed above. Otherwise, close the **Edit Property Dropdown Values** dialogue box, and then click **Save/Close** from the **Preferences** dialogue box.

2.3 Entering Data

There are several ways to enter data in CAP.

- **Text boxes:** Text boxes are blank boxes that you can use to type information like comments and recommendations.
- **Lists:** Lists display a set of items. To select an item, click the arrow beside the list, and then click the item.
- **Option Buttons:** Option buttons give you a choice of selecting one of multiple options to answer assessment questions.
- **Checkboxes:** Checkboxes are small square boxes that can be selected or cleared to turn on or off an option.

See the following figures for examples.

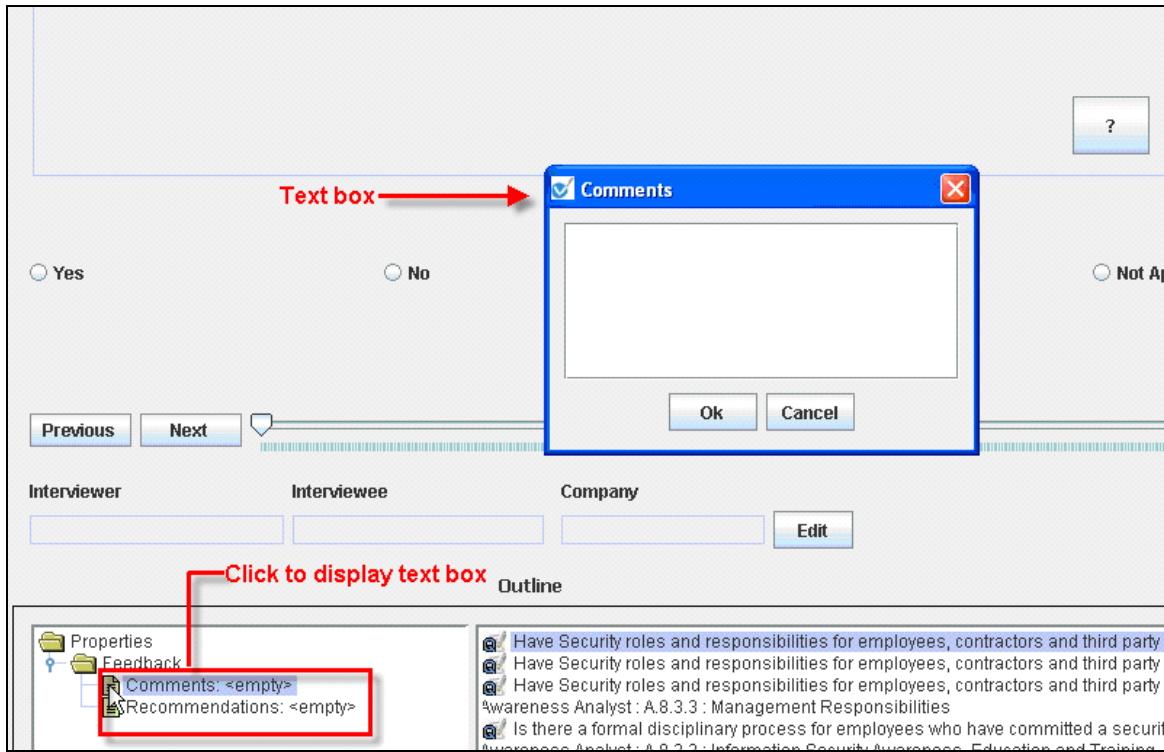


Figure 28: Textbox

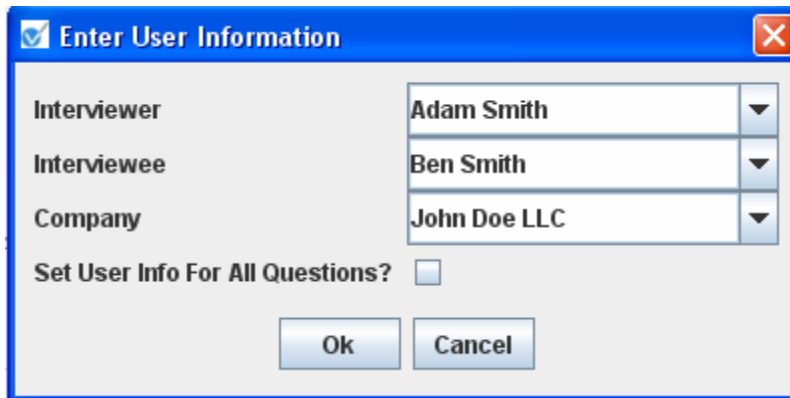


Figure 29: List

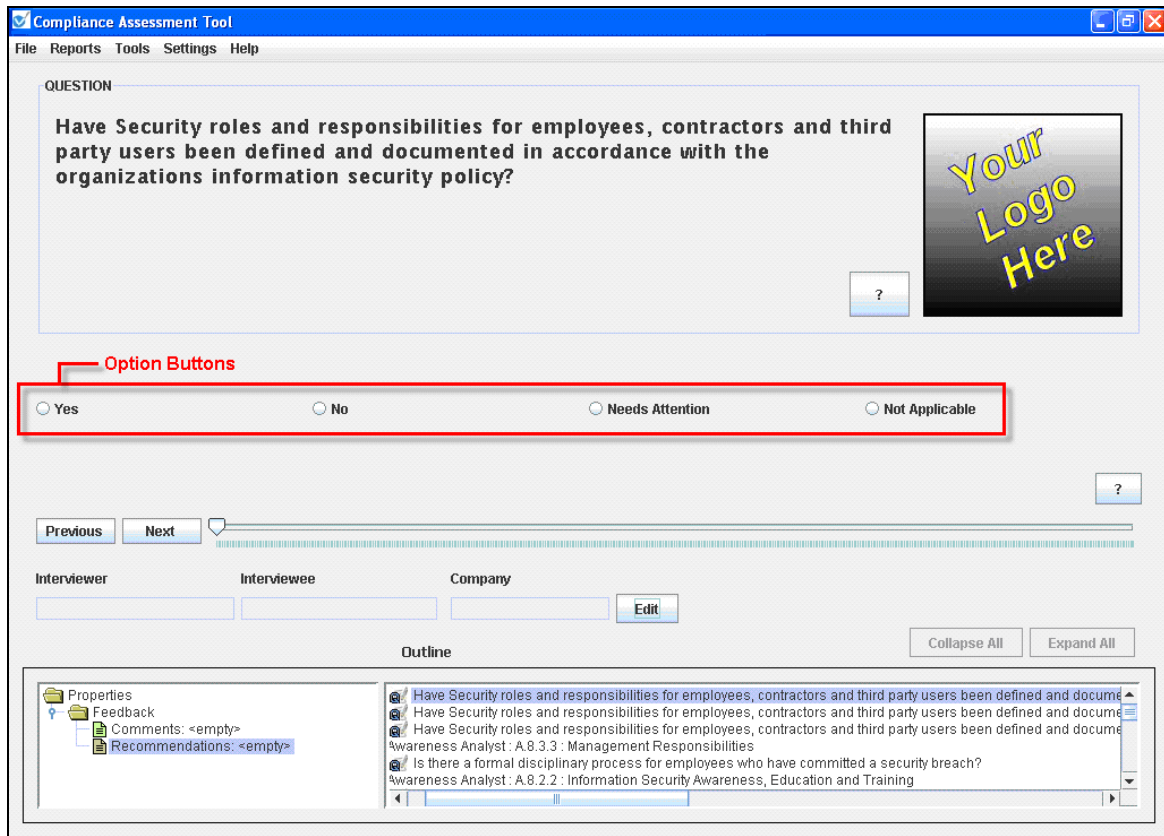


Figure 30: Option Buttons

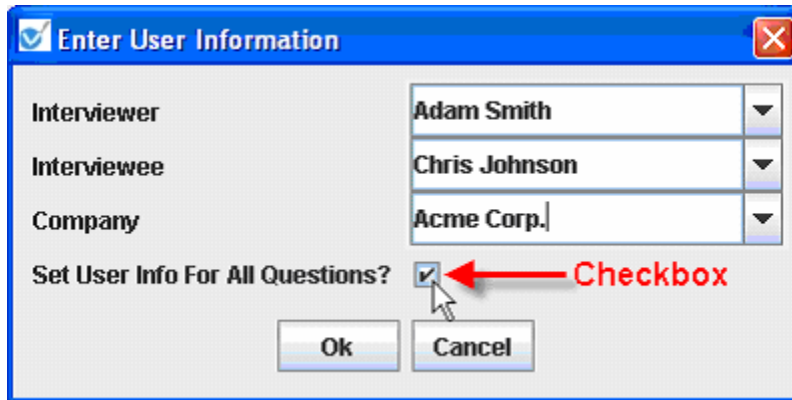


Figure 31: Checkbox

2.4 Navigating CAP


This section describes general layout and available methods for navigating through CAP.

2.4.1 General Layout and Assessment Navigation

CAP is designed for easy navigation enabling you to navigate an assessment, enter answers to interview questions, enter interview details (e.g. interviewer, interviewee, and company information), and enter comments and recommendations for each assessment question from one main window.

Question and Answers Areas

The top section of CAP displays the assessment question you are working on.

 **Note:** In order to display a question, you must have an assessment open.

Directly below the question area is the answer area, which displays a set of answer options.

See the following figure for an example of the question and answers areas.

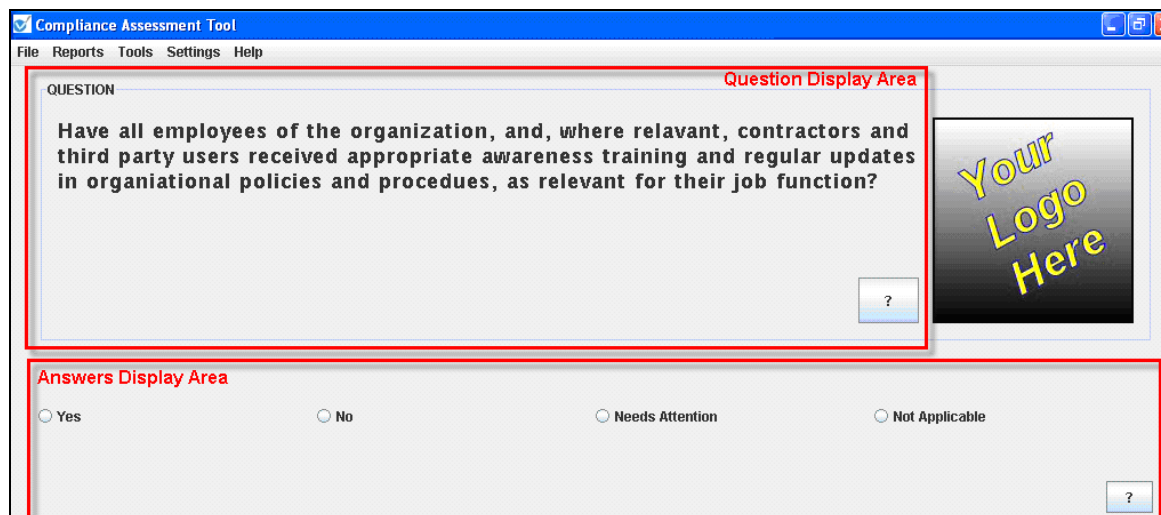



Figure 32: Question and Answers Areas

 **Note:** You can edit the answer options displayed in CAP by using the Answer Editor feature. For more information and instructions on editing answers, see section 2.2.2.3 Editing Answers.

Navigation Buttons and Sidebar

There are two assessment navigation buttons:

- **Previous:** You can navigate to the previous question of the assessment you are working on by clicking Previous.
- **Next:** You can navigate to the next question of the assessment that you are working on by clicking Next.

The sidebar is a navigation component in CAP that allows you to move quickly through an assessment by clicking and dragging the slider.

See the following figure for an example of the navigation buttons and sidebar.

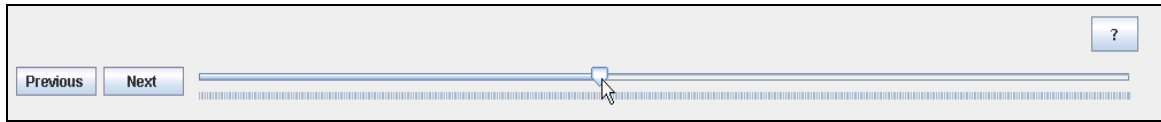


Figure 33: Assessment Navigation Slider

User Information Area

Directly below the navigation sidebar is the user information area. When working on an assessment question, the user information area will display the interviewer, interviewee, and company details for that question.

See the following figure for an example.

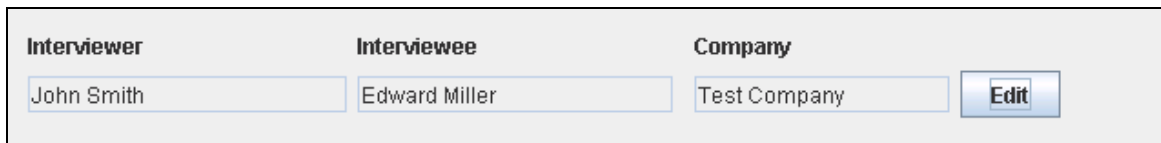


Figure 34: User Information Area

For information and instructions on editing user information see 3.2 Setting Interview Information / Editing User Information.

Outline Area

The outline area is divided into the following two outline panes.

- Feedback Pane

The feedback pane displays only those comments and recommendations related to the assessment question you are working on. You can use this area of CAP to add / change / delete comments and recommendations for individual questions.

- Assessment Pane

When an assessment is open, it displays in an outline format at the bottom of CAP, beside the feedback pane. You can navigate an assessment and move from one question to another by clicking a question in the outline area. The question selecting in the outline area displays at the top of CAP in the questions area. Also, the associated comments and recommendations display for the selected question in the feedback pane.

The vertical scroll bar allows you to move through an assessment without changing the question displayed in the question area. If a question is long, you can use the horizontal scroll bar to read the entire question without changing the question displayed in the question area.

To expand or hide the various levels of the assets list, simply double-click a level from assets list. To expand or collapse all levels of the assets list, click **Expand All** or **Collapse All**.

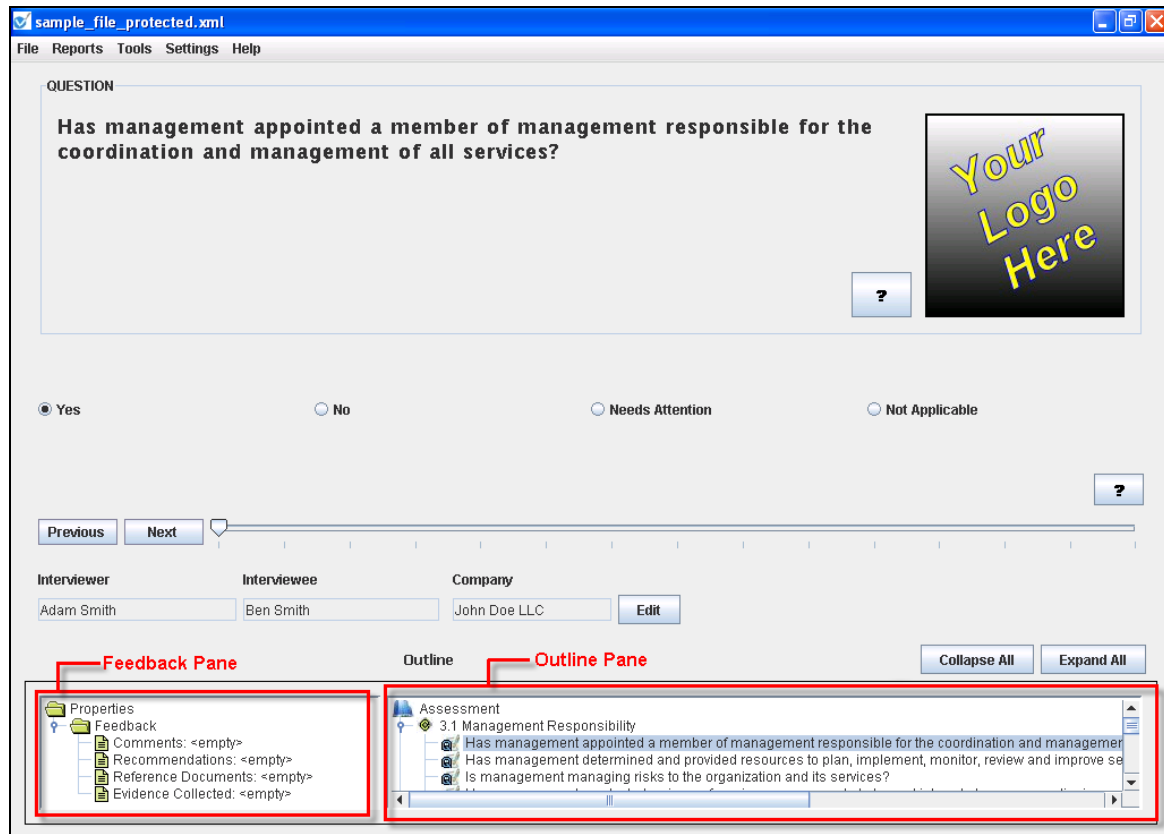


Figure 35: Outline Area

2.4.2 Menu Bar Navigation

The main menu bar is located at the top of CAP. The following options are available from the main menu bar.

Main Menu Bar Options	
Menu	Description / Options
File Menu	<p>Allows you to open assessments in both CSV and XML formats, save assessments, export assessments, close assessments, and exit the CAP program. The following options are available from the File menu.</p> <ul style="list-style-type: none"> • Open • Save • Save As • Export to CSV • Close • Exit

Main Menu Bar Options	
Reports Menu	<p>Allows you to create, print, and save assessment reports. The following options and report types are available from the Reports menu.</p> <ul style="list-style-type: none"> • Bar Chart • Pie Chart • Radar Chart • Comparison Graphs • Comparison Report • Gap Analysis
Tools Menu	<p>Allows you to edit questions available for assessment question responses and generate comparison reports. The following options are available from the Tools menu:</p> <ul style="list-style-type: none"> • Question Editor
Settings Menu	<p>Allows you to customize your start up file path; save and load your custom preferences; restore default settings; and edit answers and user information. The following options are available from the Settings menu:</p> <ul style="list-style-type: none"> • Preferences
Help Menu	<p>Provides the current RAP version information and appropriate contact and copyright information. Allows you to check for program updates and configure updates. The following options are available from the Help menu.</p> <ul style="list-style-type: none"> • About • Check for Updates • Configure Updates

See the following figures for examples.



Figure 36: Main Menu Bar

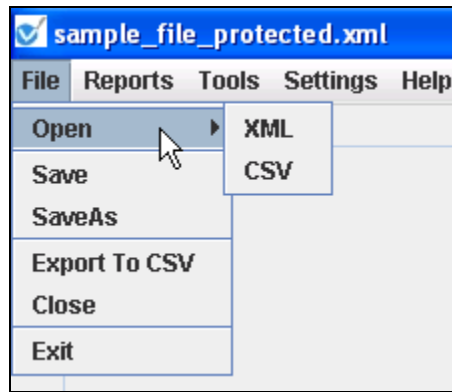


Figure 37: File Menu

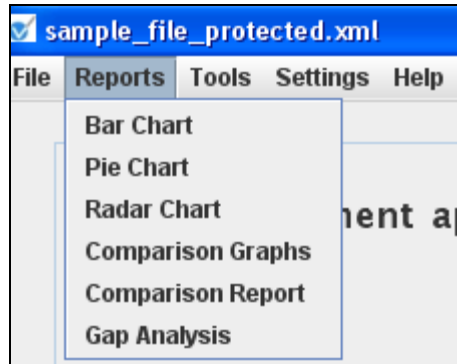


Figure 38: Reports Menu

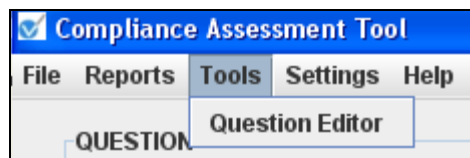


Figure 39: Tools Menu

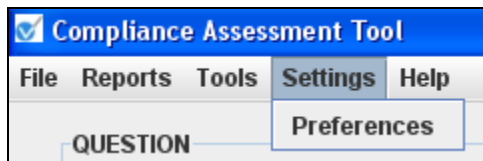


Figure 40: Settings Menu

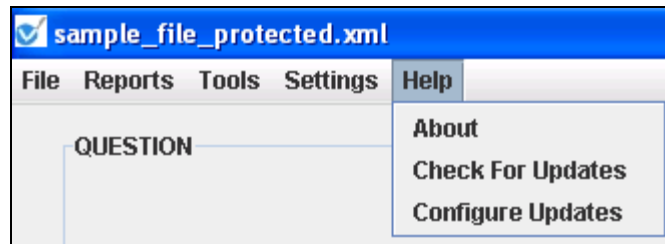


Figure 41: Help Menu

2.4.3 Action Buttons

An action button is any button in CAP that triggers an action, such as **OK** or **Edit**.

See the following figure for an example.

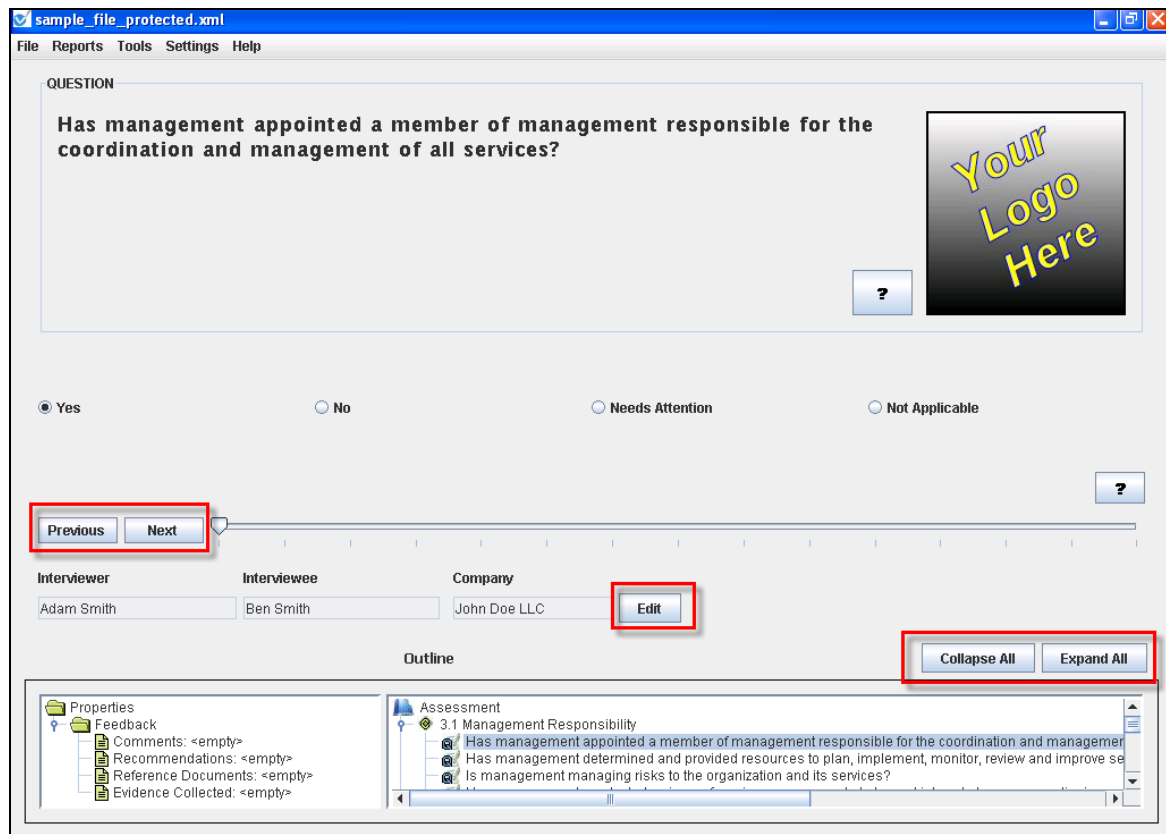




Figure 42: Action Buttons

 **Note:** Action buttons that are unavailable are dimmed.

2.4.4 Help Buttons

 To see a description and related information about an assessment question, click the Help button.

See the following figure for an example.

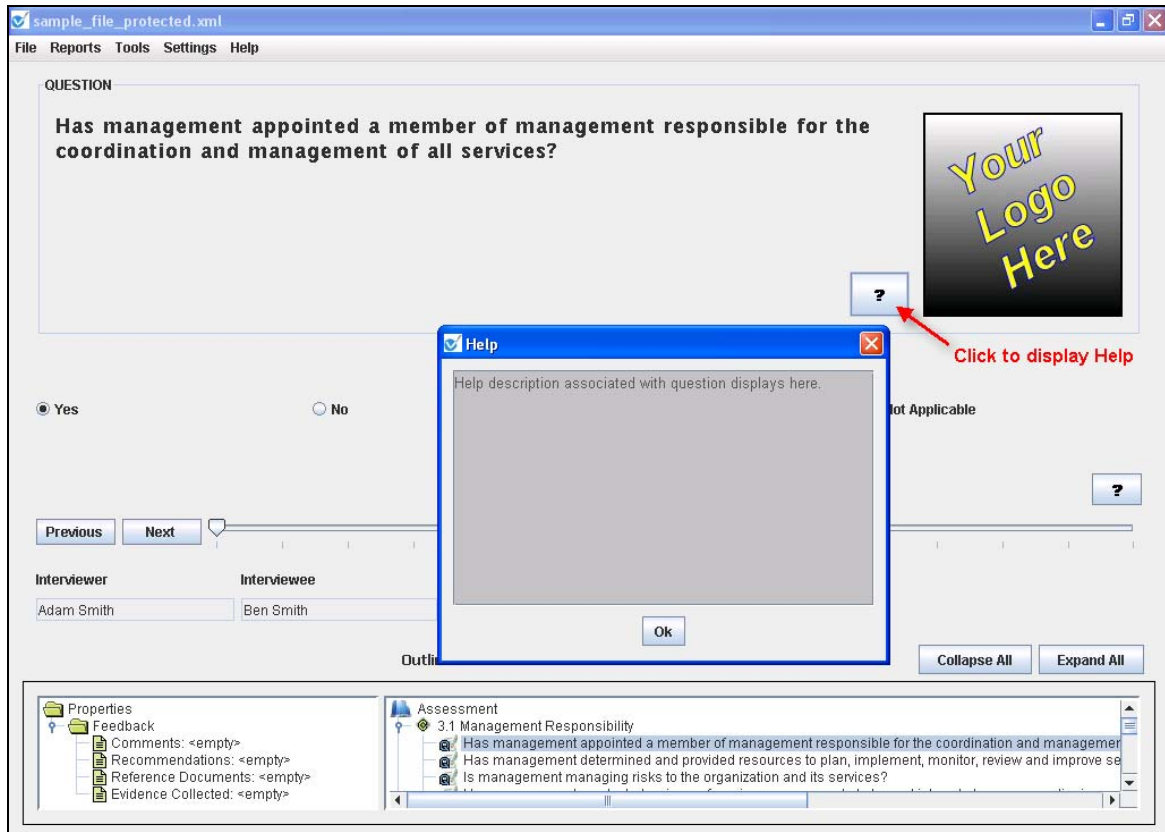


Figure 43: Help Descriptions - Example

Chapter 3 Working with Assessments

This chapter provides information and instructions for opening, saving, and exporting assessments as well as information and instructions for answering interview questions, editing user information, and entering comments and recommendations.

3.1 Opening an Assessment

To work on an assessment, you will first need to open the assessment file in CAP.

! Important: Assessment files must be opened in either CSV (Comma Separated Values) or XML (Extensible Markup Language) format.

To open an assessment, complete the following steps.

1. From the **File** menu, click **Open**.
2. Select the file type you want to open.

The following example illustrates a CSV file being opened.

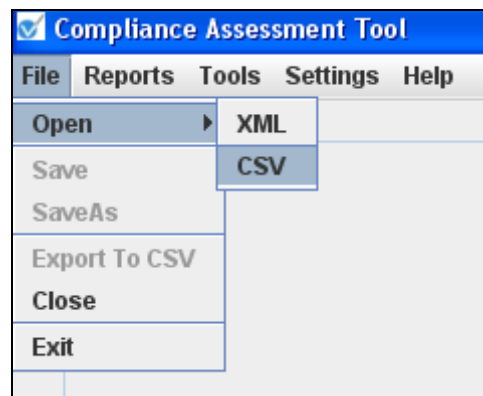


Figure 44: Selecting a File Type

A dialogue box opens.

See the following figure for an example.

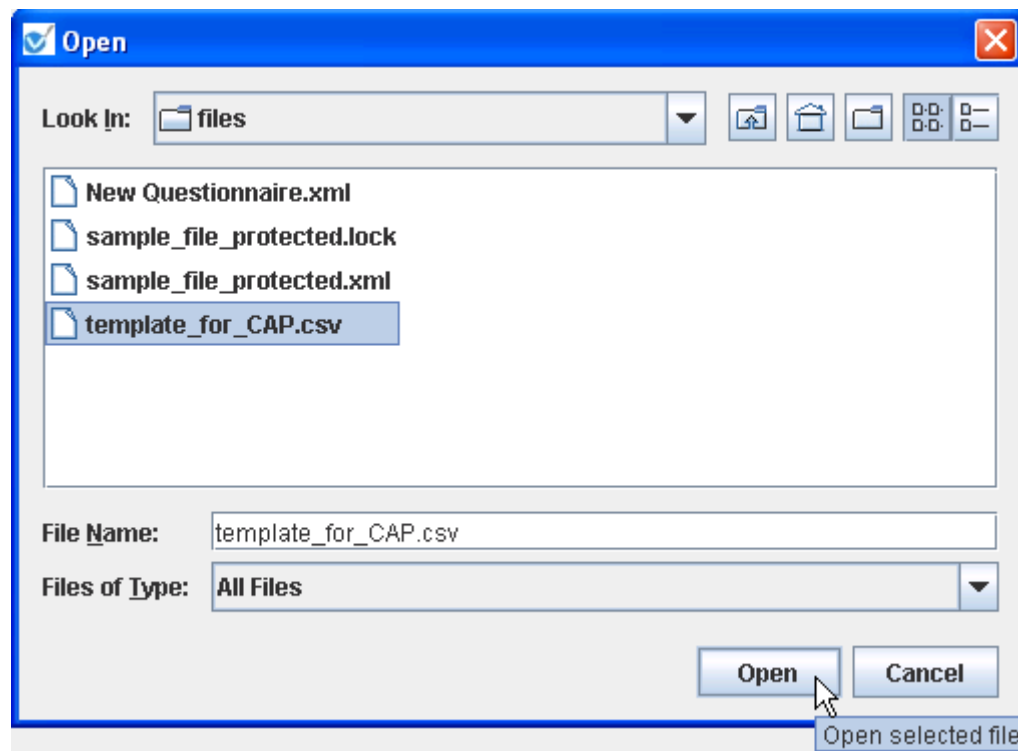


Figure 45: Opening an Assessment File

The assessment opens and the first question of the assessment displays at the top of CAP. Additionally, the Set Interview Information dialogue box opens. This dialogue box asks you if you would like to set the user information (i.e. interviewer, interviewee, and company) for all questions.

3.2 Setting Interview Information / Editing User Information

There are two ways you can set interview user information.

When you first open an assessment, the Set Interview Information dialogue box opens. By selecting "Yes," the Enter User Information dialogue box opens, which is where you can set the same user information (i.e. interviewer, interviewee, and company) for all questions.

See the following figure for an example.

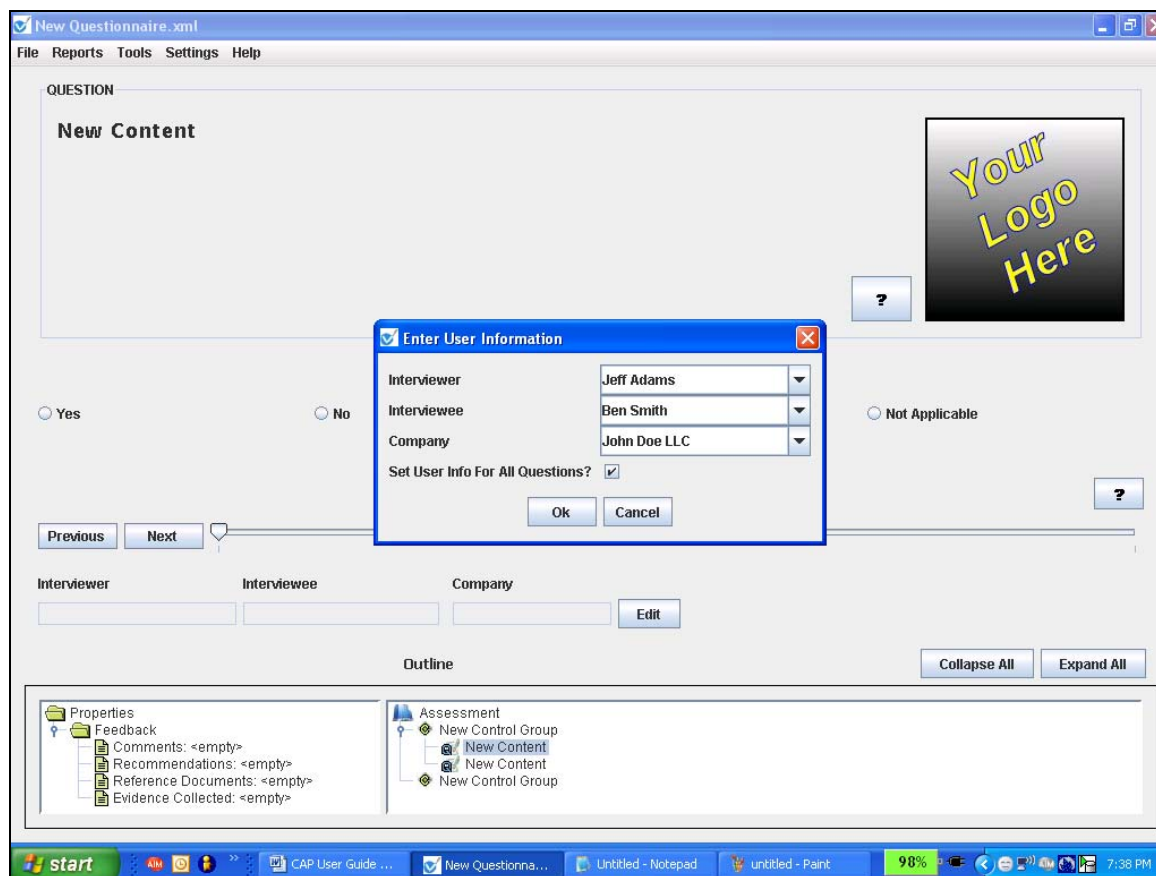


Figure 46: Enter User Information Dialogue Box


3. Select the **Interviewer**, **Interviewee**, and **Company**.
4. Click **Ok**.

 **Note:** To cancel the action and exit the Enter User Information dialogue box, click **Cancel**.

3.3 Answering Assessment Questions

To enter an answer to an assessment question, complete the following steps:

1. Navigate to the assessment question.

 **Note:** For information and instructions on navigating an assessment, see General Layout and Assessment Navigation.

The question displays at the top of CAP.

2. Select an answer from the available options.

See the following figure for an example.

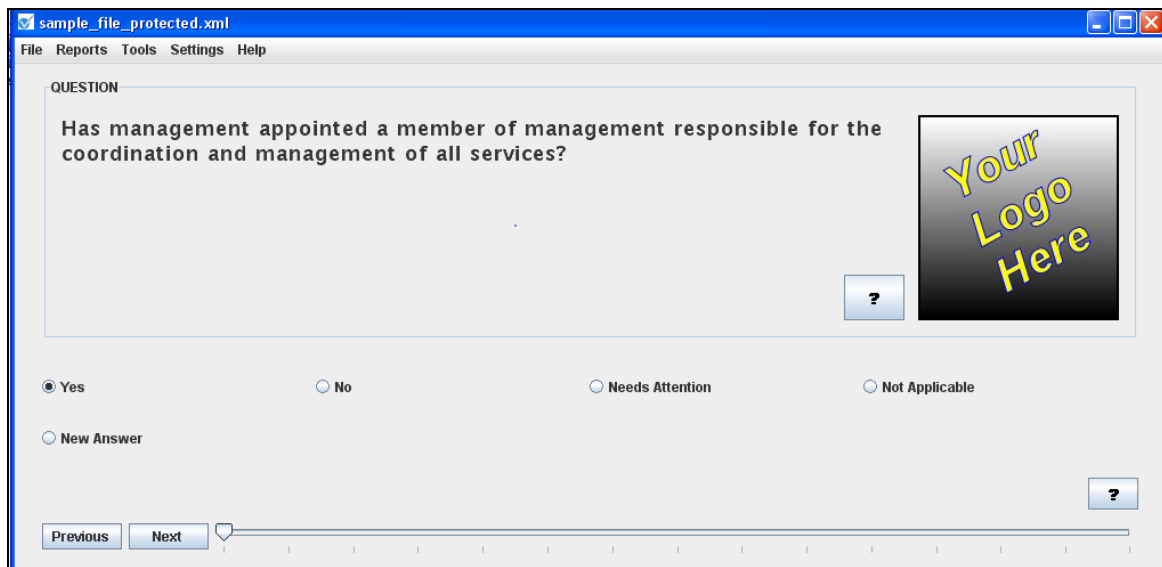


Figure 47: Selecting an Answer

- To save an assessment, see section 3.4 Saving an Assessment.
- To add comments or recommendations for the associated question, see section 3.5 Adding Comments / Recommendations.
- To export an assessment, see section 3.6 Exporting an Assessment.

3.4 Saving an Assessment

To save an assessment, do the following:

- From the **File** menu, select **Save** or **Save As**.

See the following figure for an example.

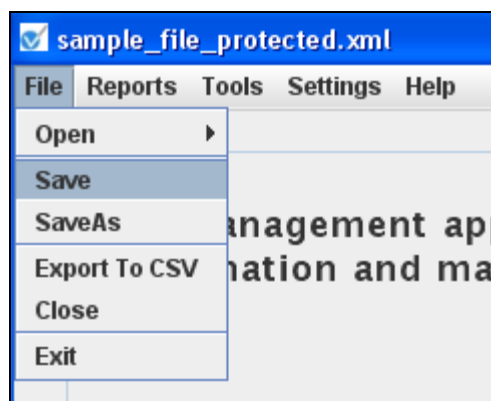


Figure 48: Saving an Assessment

3.5 Adding Comments / Recommendations / Reference Documents / Evidence Collected

You can enter comments, recommendations, reference documents and evidence collected for each control group question.

To enter comments / recommendations / reference documents / evidence collected, complete the following steps.

1. Navigate to the question.



Note: Information and instructions for assessment navigation can be found in section 2.4.1 General Layout and Assessment Navigation.

2. From the feedback pane, do the following:
 - To add a comment, click the Comments.
 - To add a recommendation, click Recommendations.

See the following figure for an example.

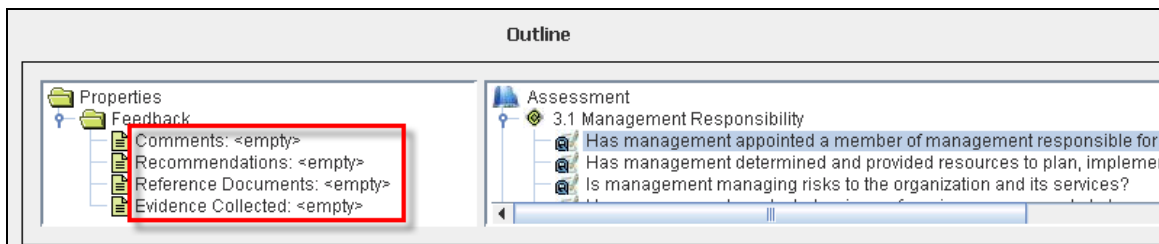


Figure 49: Adding Comments, Recommendations, Reference Documents and Evidence Collected

A text box opens. See the following figure for examples of Comments, Recommendations, Reference Documents and Evidence Collected textboxes.

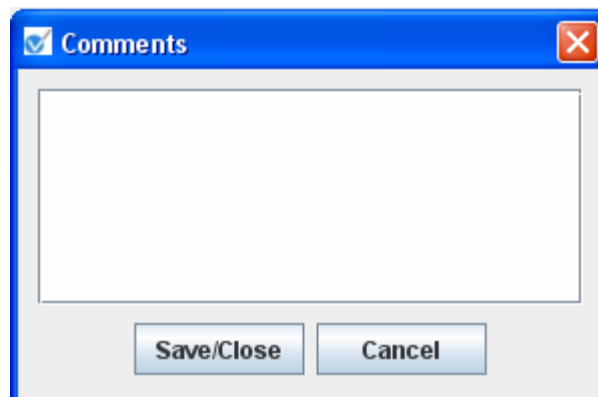


Figure 50: Comments Textbox

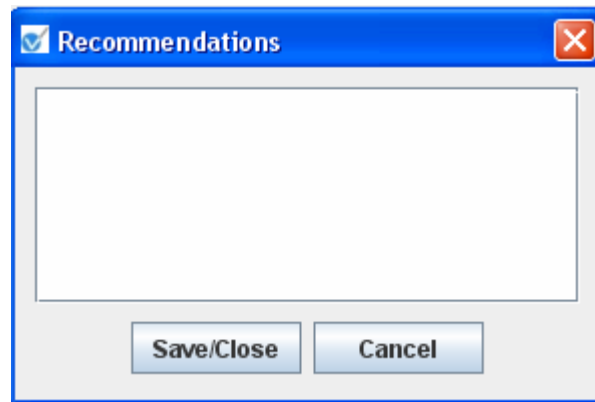


Figure 51: Recommendations Textbox

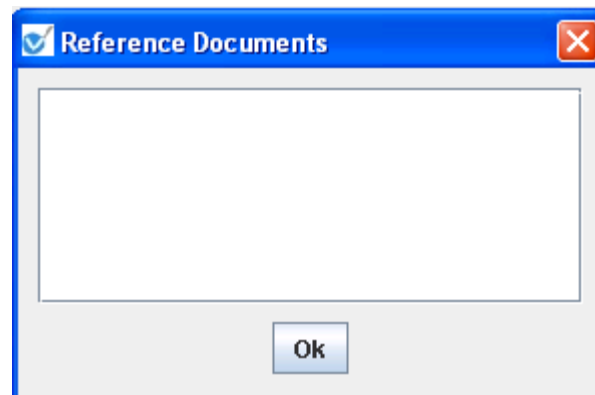


Figure 52: Reference Documents Textbox

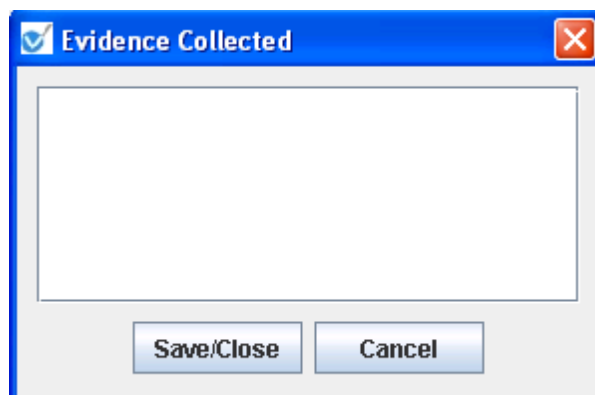



Figure 53: Evidence Collected Textbox

3. Enter your comments, recommendations, reference documents or evidence collected in the textbox, and then click **Save/Close** or **Ok**.

The following is an example of comments being entered.

 **Note:** To cancel the action and exit, click **Cancel**.

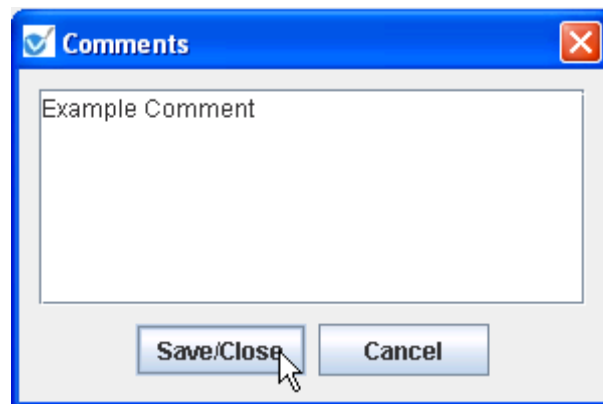
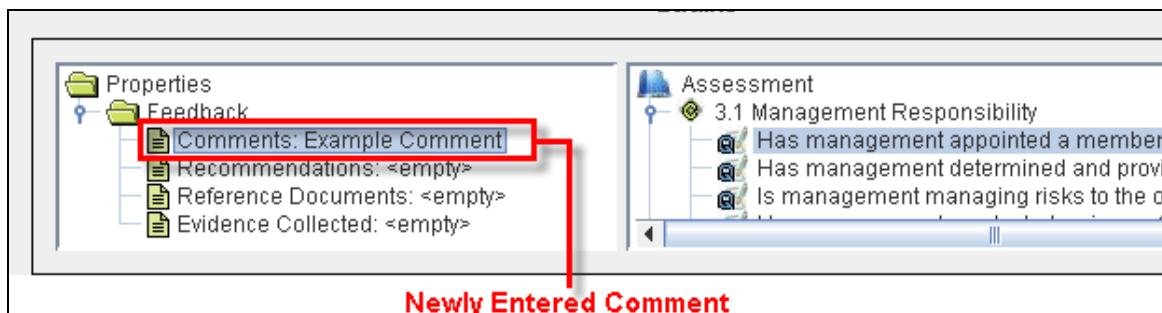


Figure 54: Entering Comments

The newly added comment displays for the associated question in the feedback pane.

See the following figure for an example.



Newly Entered Comment

Figure 55: Newly Entered Comments

3.6 Exporting an Assessment

You can export an assessment from CAP to a file in CSV format.

To export an assessment, complete the following steps.

1. From the **File** menu, click **Export to CSV**.

See the following figure for an example.

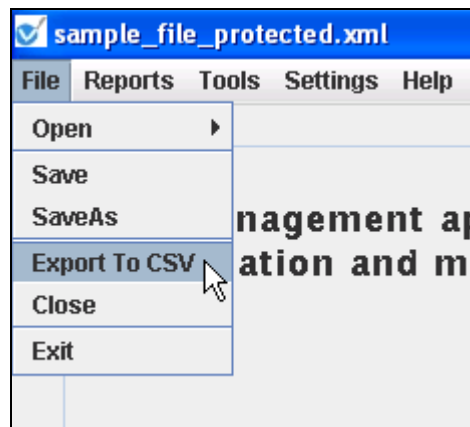


Figure 56: Exporting an Assessment

2. **Optional.** From the **File Name** field, change the file name.
3. Select the location where you want to save the file, and then click **Save**.
The assessment is exported successfully to the selected location.

Chapter 4 Reports

This chapter provides you with information and instructions for generating, printing, and saving reports. The following report types are available in CAP.

- Bar Charts
- Pie Charts
- Radar Charts
- Comparison Graphs
- Comparison Report
- Gap Analysis

4.1 Generating Bar Charts

CAP provides you with the ability to present assessment data and results graphically in bar charts.

To generate a bar chart, complete the following steps.

1. Open an assessment by following the instructions in section 3.1 Opening an Assessment.
2. From the **Reports** menu, select **Bar Chart**.

See the following figure for an example.

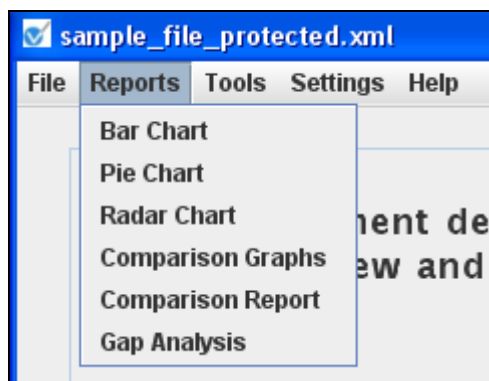


Figure 57: Selecting a Report Type

The Select Report dialogue box opens.

See the following figure for an example.




Figure 58: Select Report Dialogue Box

3. Select a report format from the list provided.

The following table provides you with information that will help you select a report format.

Generating Reports – Bar Charts	
Report Format	Description
All Control Groups (Single)	This layout displays assessment data from all control groups in one chart.
All Control Groups (Multiple)	This layout displays assessment data in multiple charts. Each chart presents data for one control group.
Individual Control Group	This layout displays data for the selected control group in one chart.

 **Note:** Individual Control Group is not the name of the report format. To display the data from one control group, select the name of the group.

See the following figure for an example.

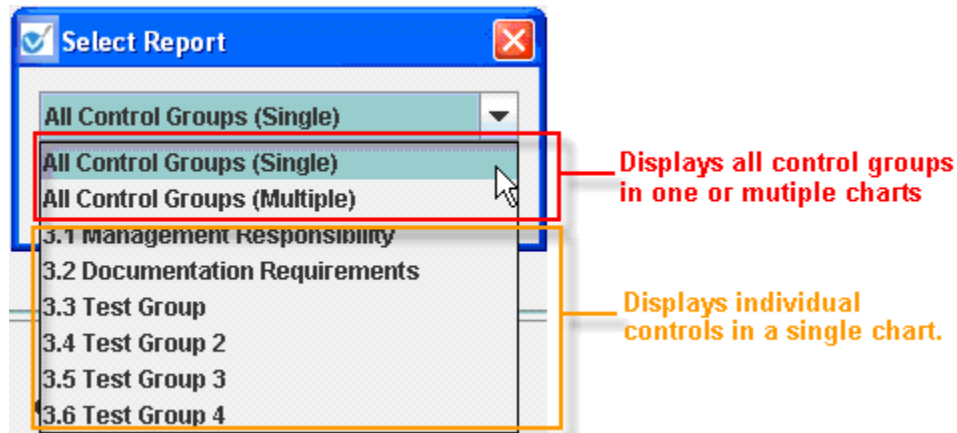


Figure 59: Bar Chart Report Layouts

- See Figure 60 for an example of a bar chart in All Control Group (Single) format.
- See Figure 61 for an example of a bar chart in All Control Group (Multiple) format.
- See Figure 62 for an example of a bar chart in an individual control group format.

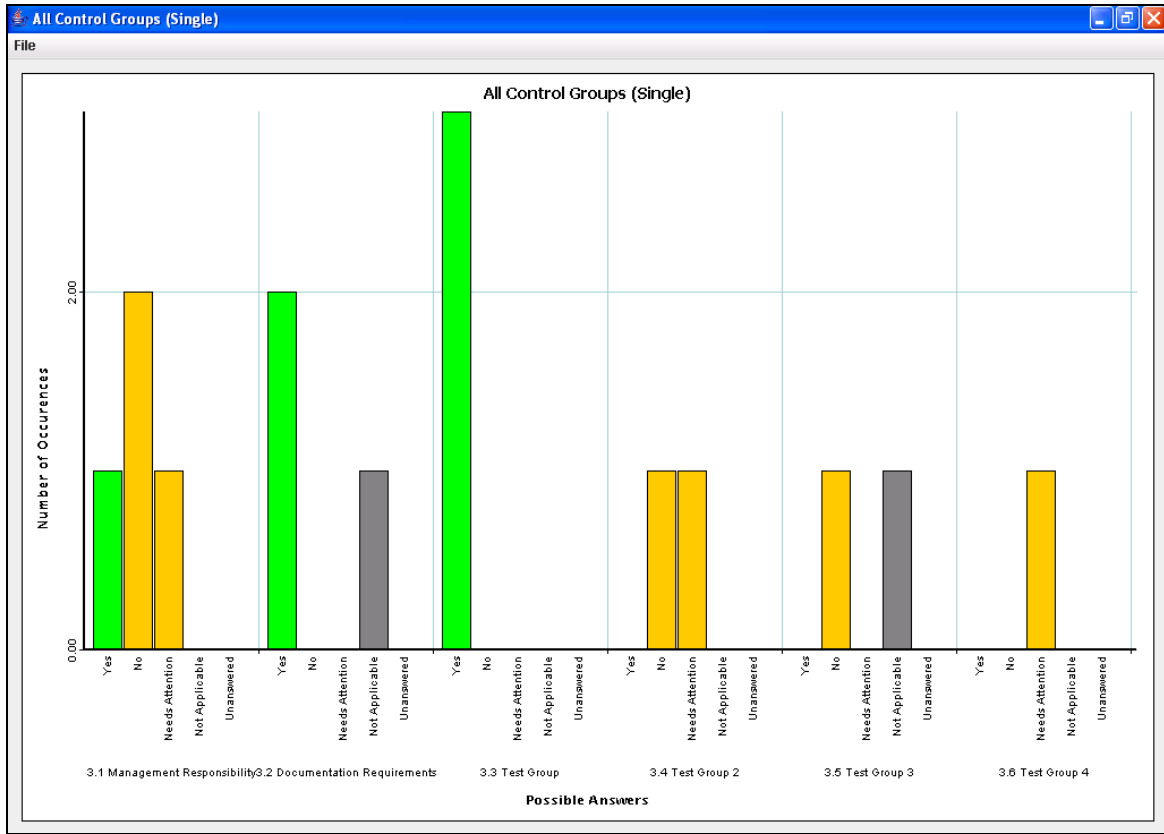


Figure 60: Bar Chart - All Control Group (Single) Format

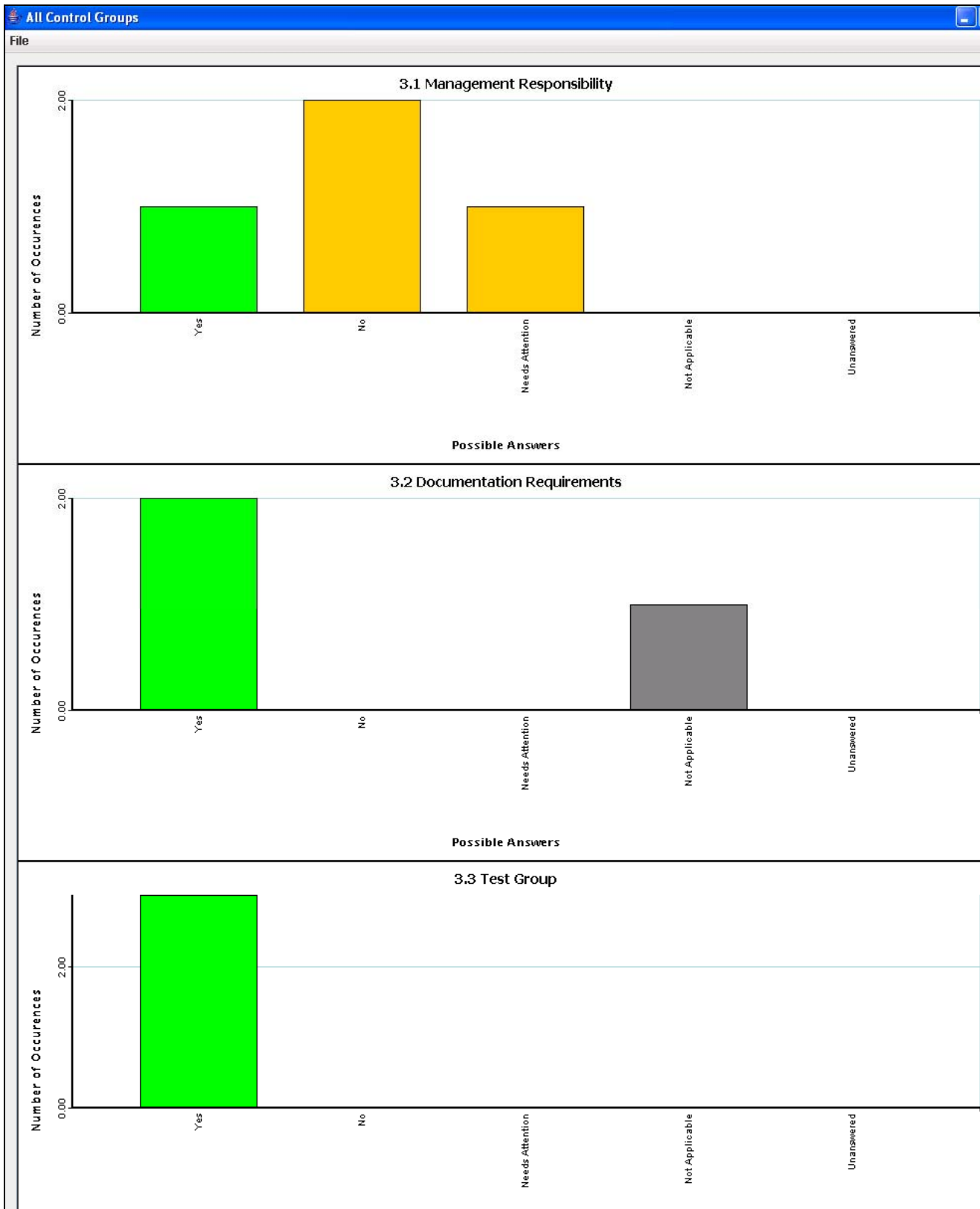


Figure 61: Bar Chart - All Control Group (Multiple) Format

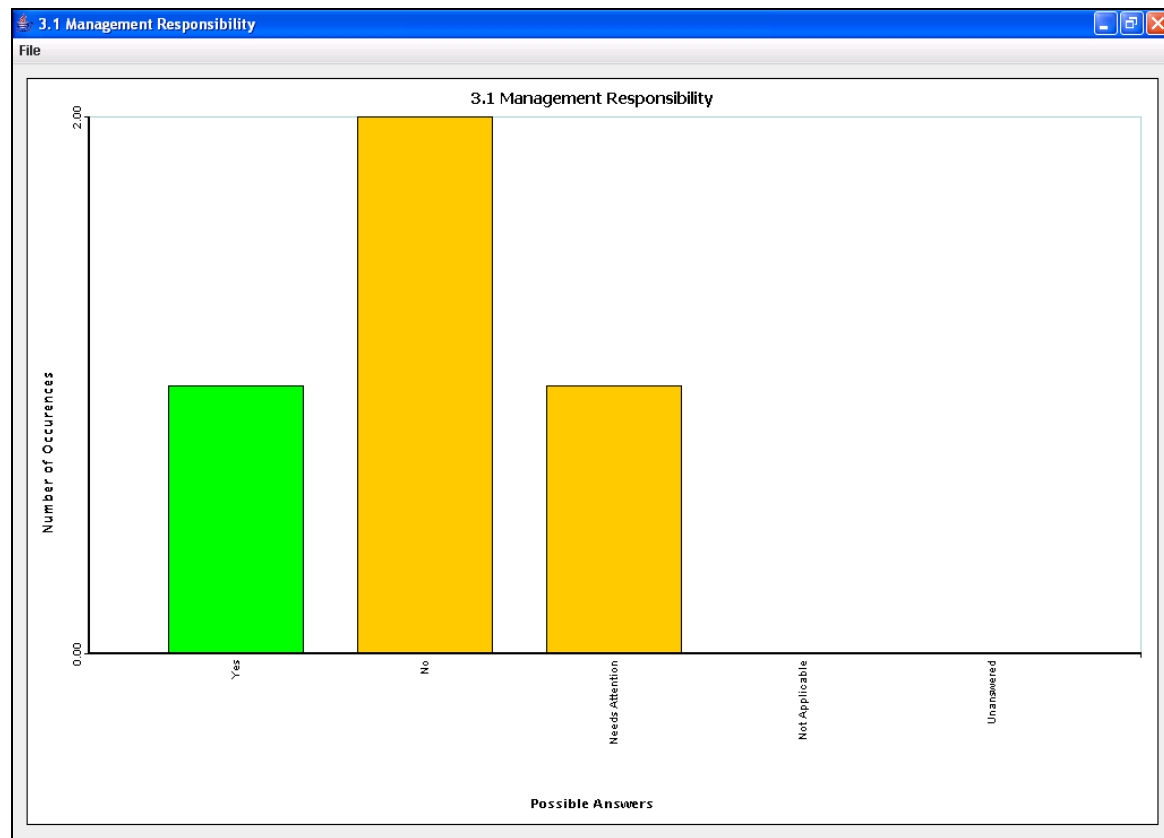


Figure 62: Bar Chart – Individual Control Format

- To print the report, select **Print** from the **File** menu.
- To save the report as a JPEG file, select **Save as JPEG** from the **File** menu.
- To close the report, select **Close** from the **File** menu.

4.2 Generating Pie Charts

CAP provides you with the ability to present assessment data and results graphically in pie charts.

To generate a pie chart, complete the following steps.

1. From the **Reports** menu, select **Pie Chart**.

See the following figure for an example.

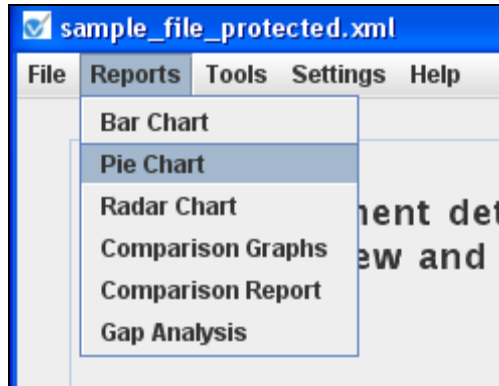


Figure 63: Selecting Report Type

The **Select Report** dialogue box opens.

See the following figure for an example.

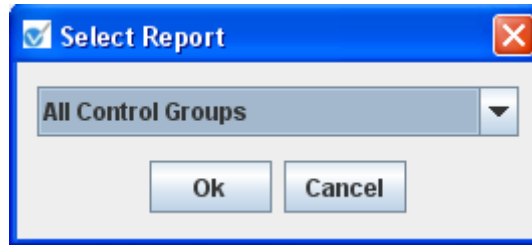



Figure 64: Select a Report Dialogue Box

2. Select a report format from the list provided.

The following table provides you with information that will help you select a report format.

Generating Reports – Pie Charts	
Report Format	Description
All Control Groups	This layout displays assessment data in multiple charts. Each chart presents data for one control group.
All Content	This layout displays assessment data from all control groups in one chart.
Individual Control Group  Note: Individual Control Group is not the name of the report format. To display the data from one control group, select the name of the group.	This layout displays data for the selected control group in one chart.

See the following figure for an example.

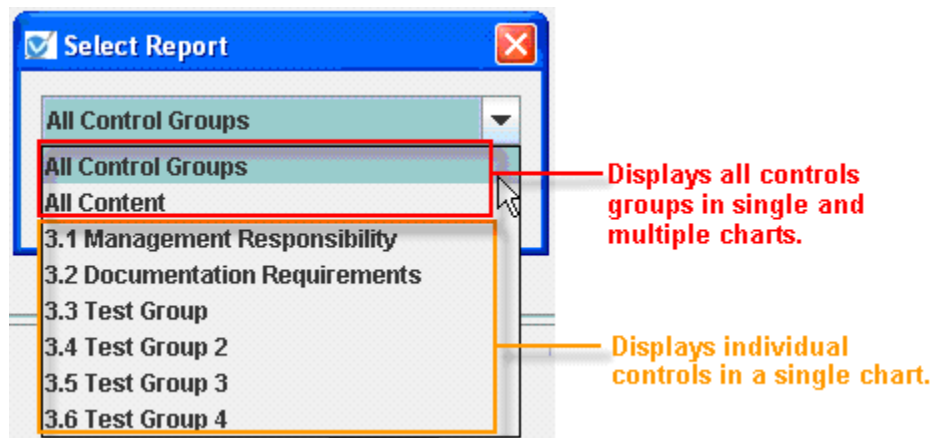


Figure 65: Pie Chart Report Layouts

- See Figure 66 for an example of a pie chart in All Control Groups format.
- See Figure 67 for an example of a pie chart in All Content format.

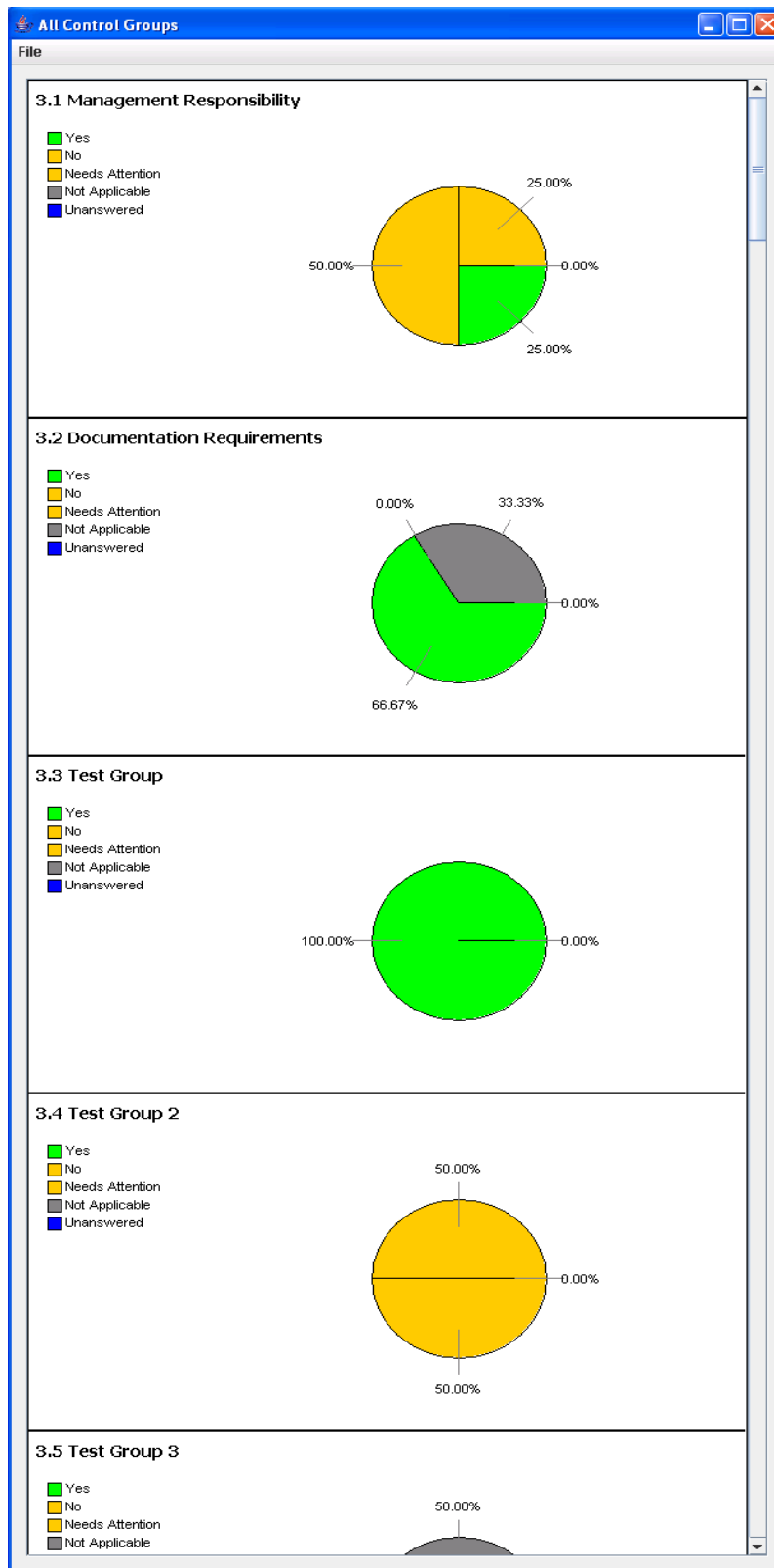


Figure 66: Pie Chart - All Control Groups

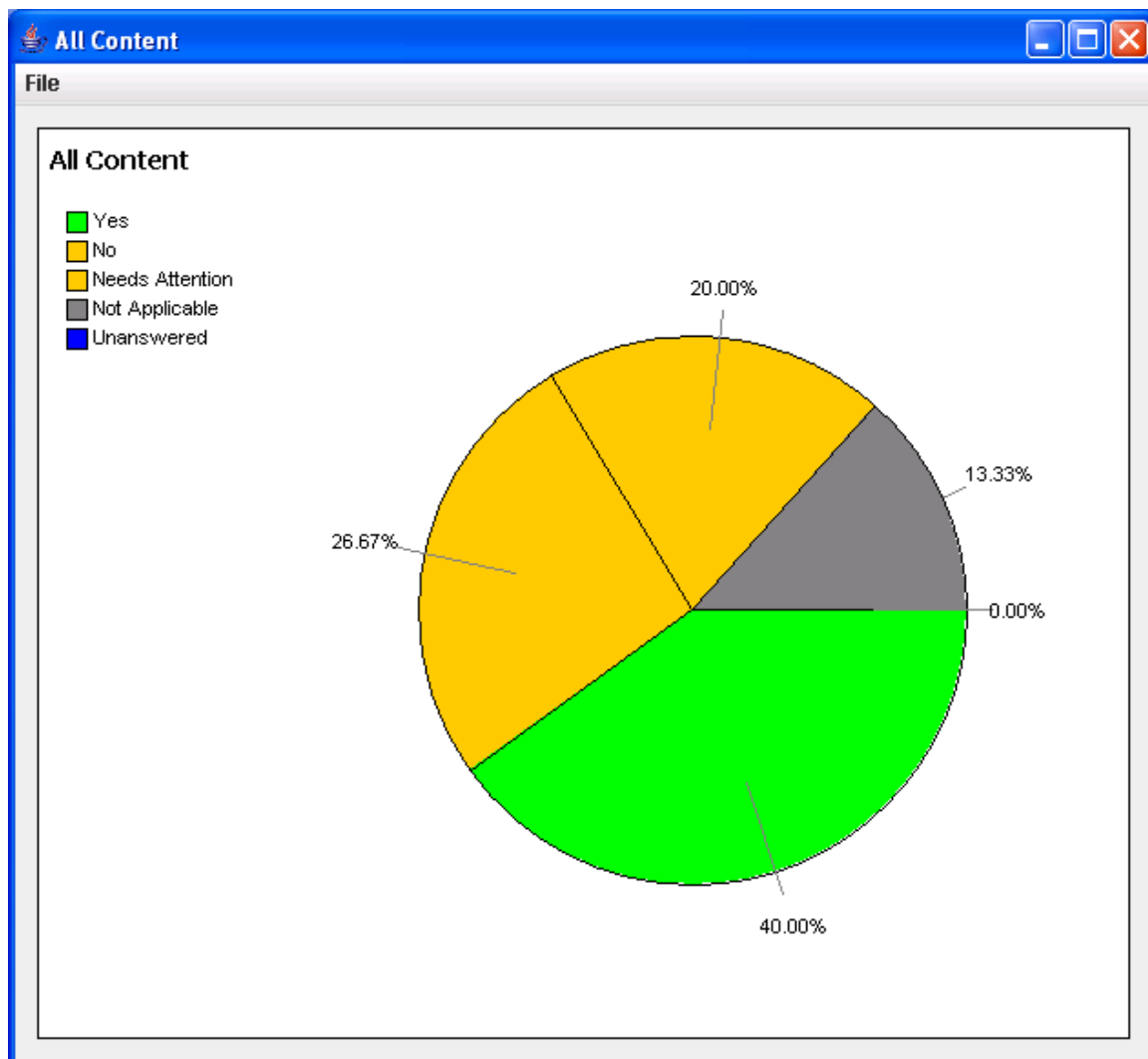


Figure 67: Pie Chart –All Content

- To print the report, select **Print** from the **File** menu.
- To save the report as a JPEG file, select **Save as JPEG** from the **File** menu.
- To close the report, select **Close** from the **File** menu.

4.3 Generating Radar Charts

CAP provides you with the ability to present assessment data and results graphically in radar charts.

To generate a radar chart, complete the following steps.

1. From the **Reports** menu, click **Radar Chart**.

See the following figure for an example.

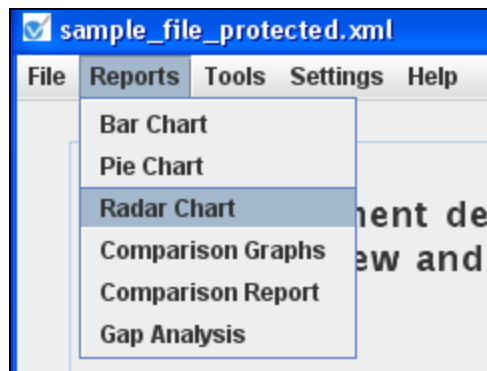


Figure 68: Generating a Radar Chart

The Radar Chart displays.

See the following figure for an example.

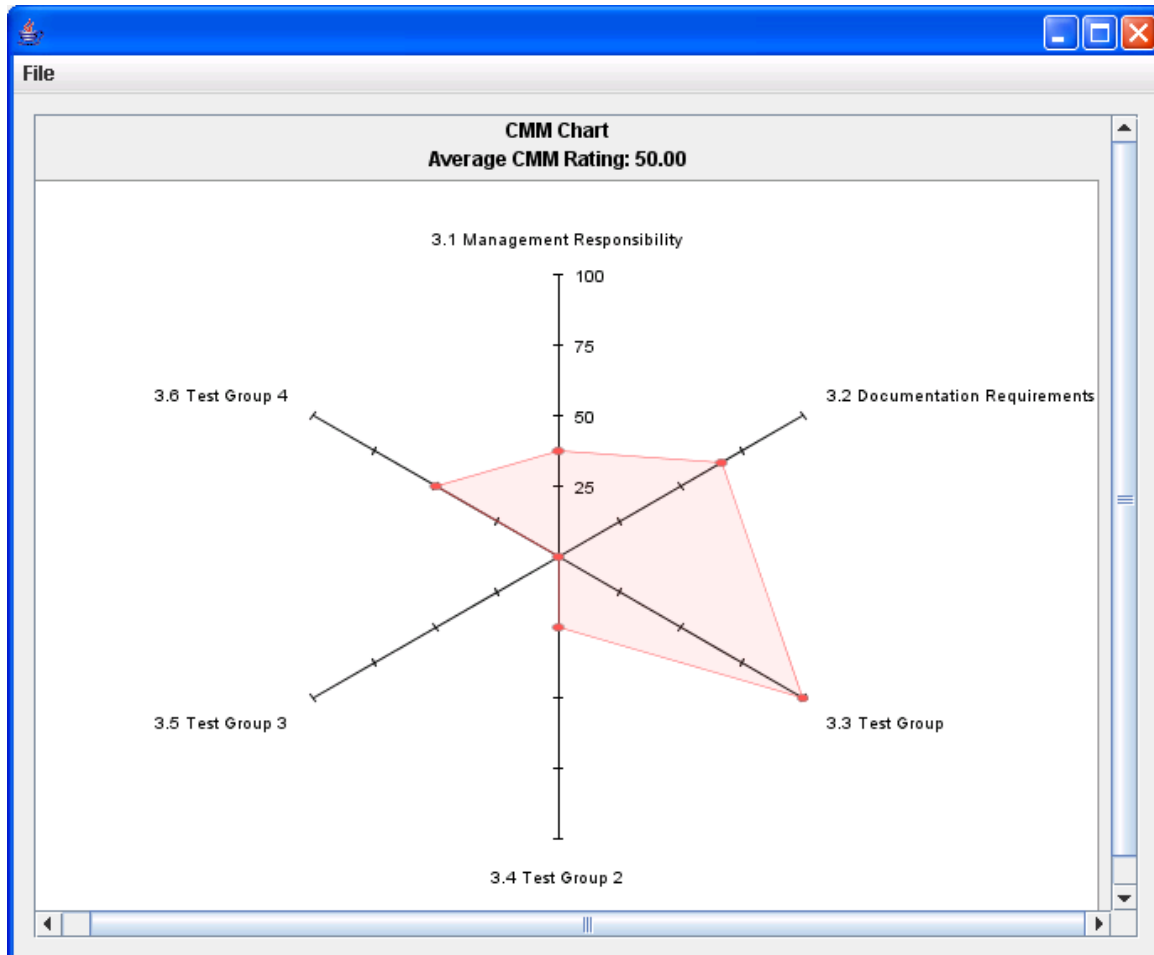


Figure 69: Radar Chart

- To print the report, select **Print** from the **File** menu.
- To save the report as a JPEG file, select **Save as JPEG** from the **File** menu.

- To close the report, select **Close** from the **File** menu.

4.4 Generating a Comparison Graph

To generate a radar chart, complete the following steps.

1. From the **Reports** menu, click **Comparison Graph**.

See the following figure for an example.

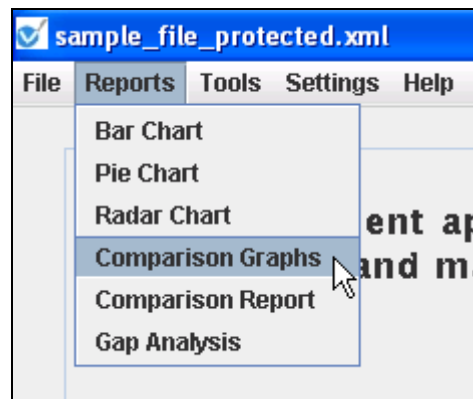



Figure 70: Generating a Radar Chart

The **Select one or more CAP xml file(s) to run comparison graphs on** dialogue box opens.

See the following figure for an example.

Figure 71: Select one or more CAP xml file(s) to run comparison graphs on

2. Select one or more CAP xml files to run comparison graphs on.

 **Note:** To select multiple reports from, hold down the Control key on your keyboard, and then click the files you want to select.

See the following figure for an example.

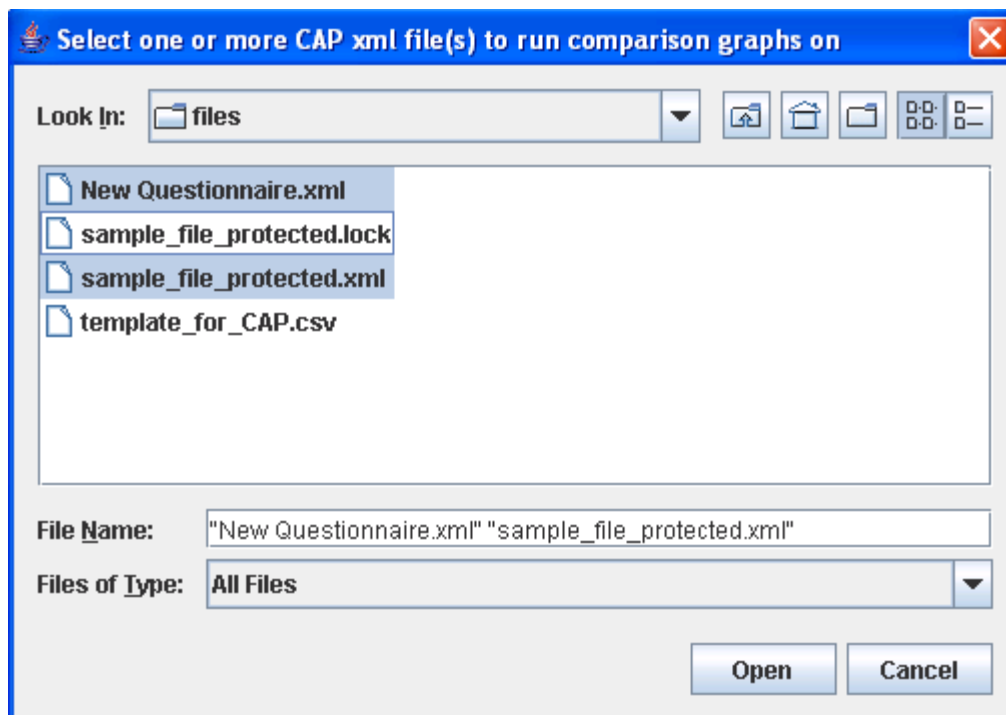


Figure 72: Selecting Multiple Files

The Comparison Graph displays.

See the following figure for an example.

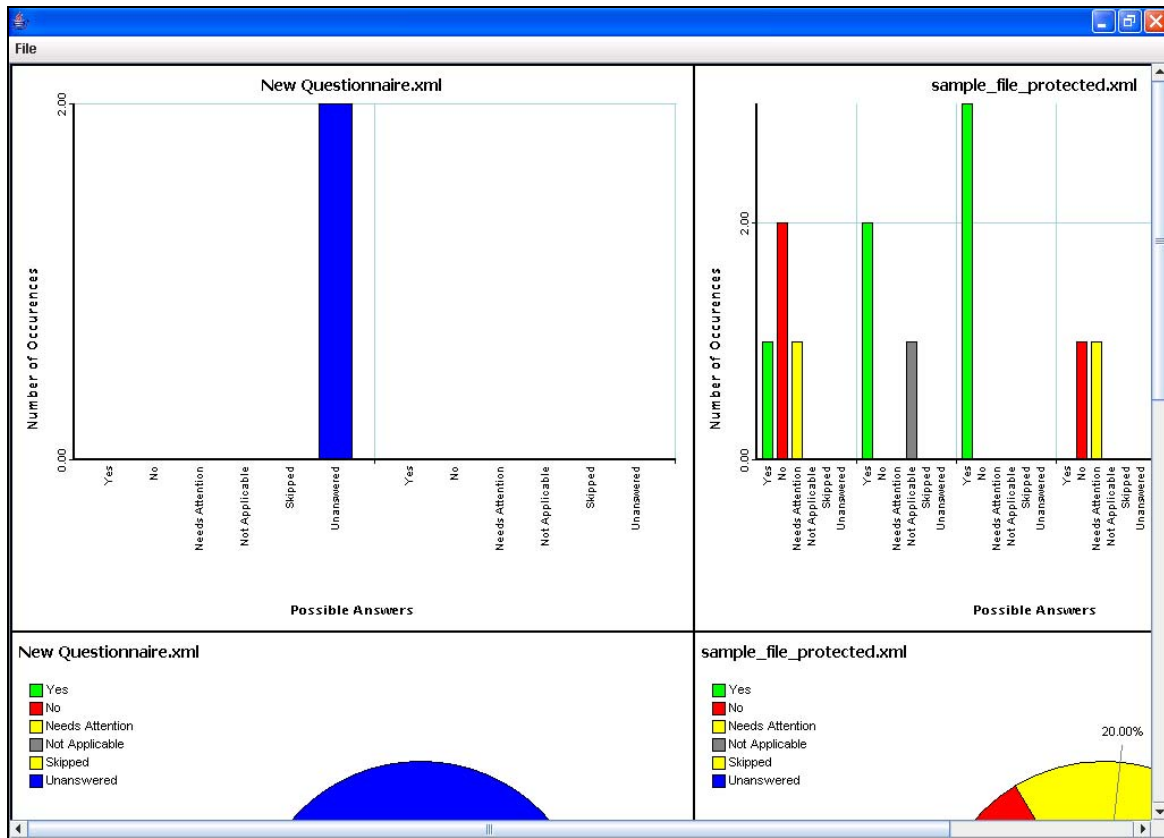


Figure 73: Comparison Graph

- To save the report as a JPEG file, select **Save as JPEG** from the **File** menu.
- To close the report, select **Close** from the **File** menu.

4.5 Generating a Comparison Report

You can compare two files and associated asset data by using the Comparison Report.

To generate a Comparison Report, complete the following steps:

1. From the **Reports** menu, select **Comparison Report**.

See the following figure for an example.

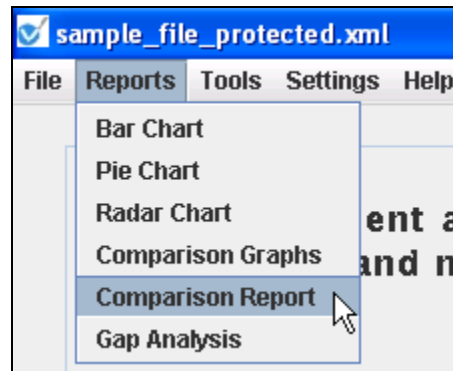


Figure 74: Generating a Comparison Report

The **Select base file** dialogue box opens.

See the following figure for an example.

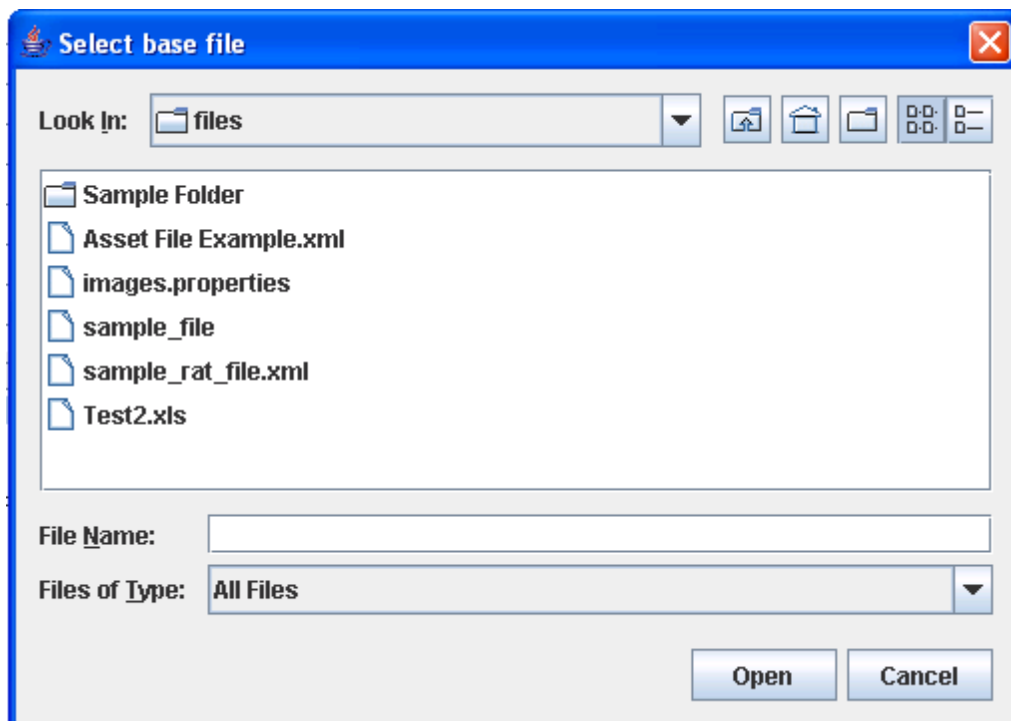


Figure 75: Select base file Dialogue Box

2. Locate the assets file you want to use as your baseline for the comparison, and then click **Open**.

The **Select file to compare with** dialogue box opens.

See the following figure for an example.

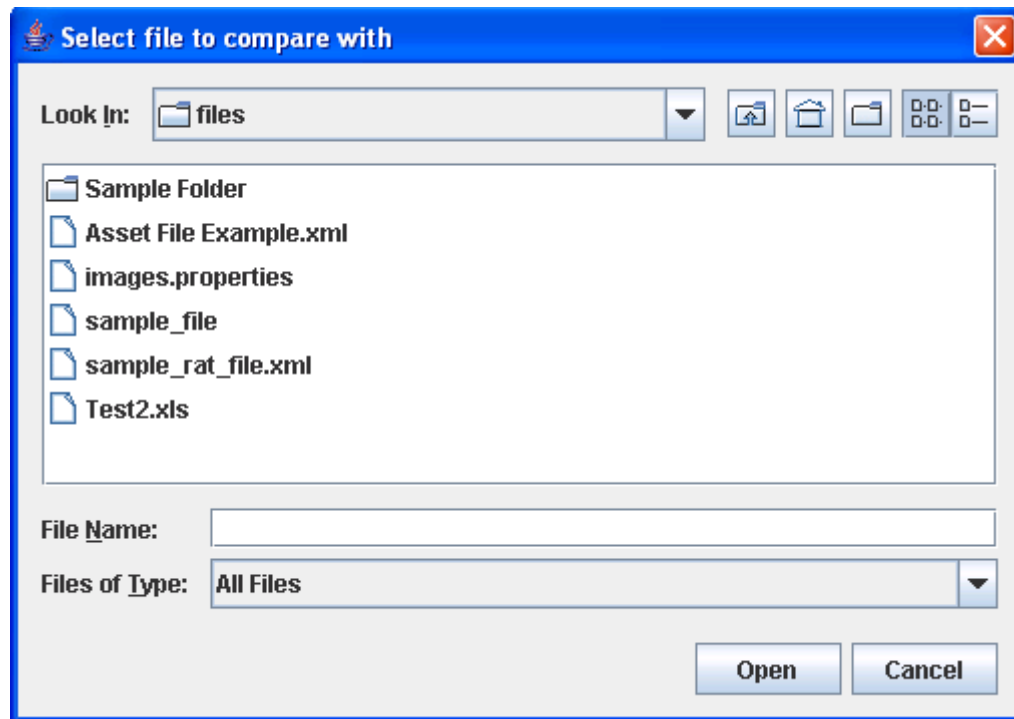


Figure 76: Select file to compare file Dialogue Box

3. Locate the assets file you want to use to compare with the baseline file previously selected, and then click **Open**.

The *Select location to save exported file* dialogue box opens.

See the following figure for an example.

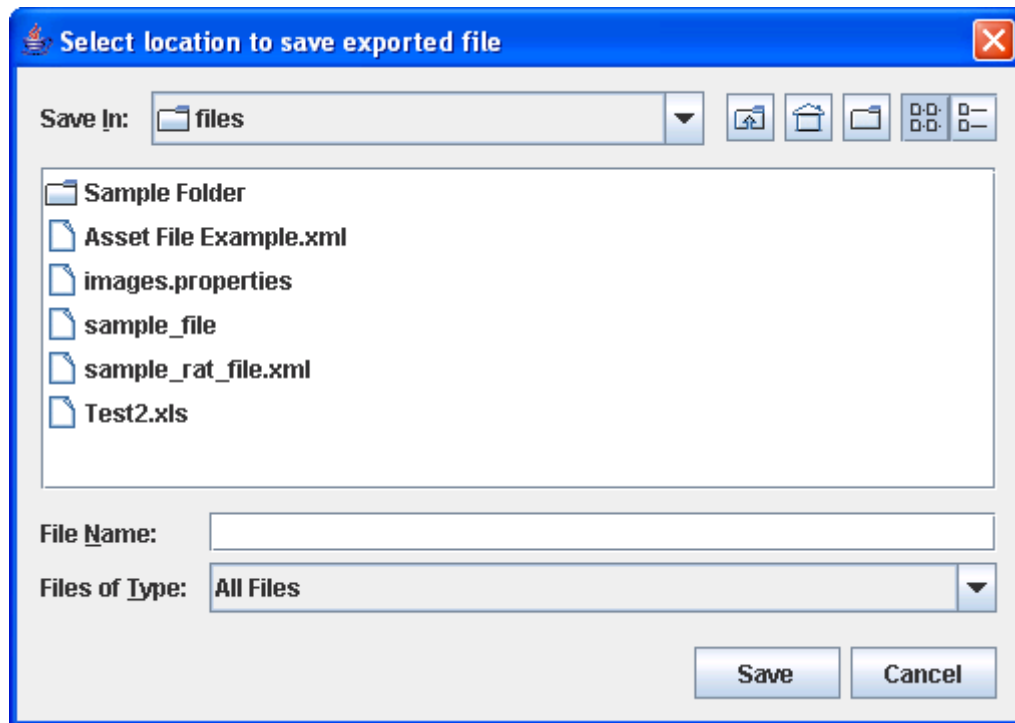


Figure 77: Select location to save exported file Dialogue Box

A **Message** dialogue box opens, providing you with the location of the exported file.

See the following figure for an example.

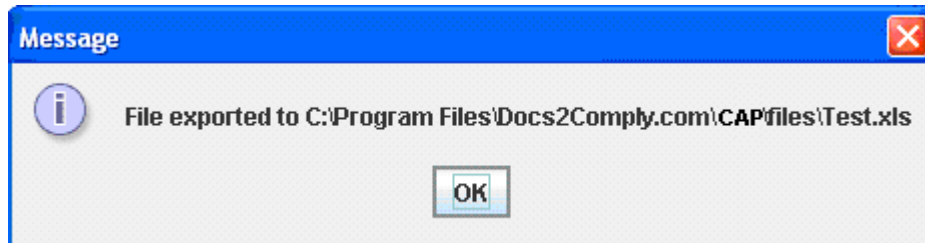


Figure 78: Message Dialogue Box – Location of File

4. Click **OK**.

4.6 Generating a Gap Analysis

To generate a gap analysis, complete the following steps.

1. From the **Reports** menu, click **Gap Analysis**.

See the following figure for an example.

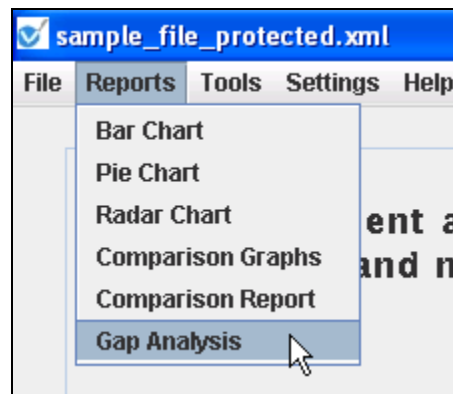


Figure 79: Generating a Gap Analysis

The **Select base file** dialogue box opens.

See the following figure for an example.

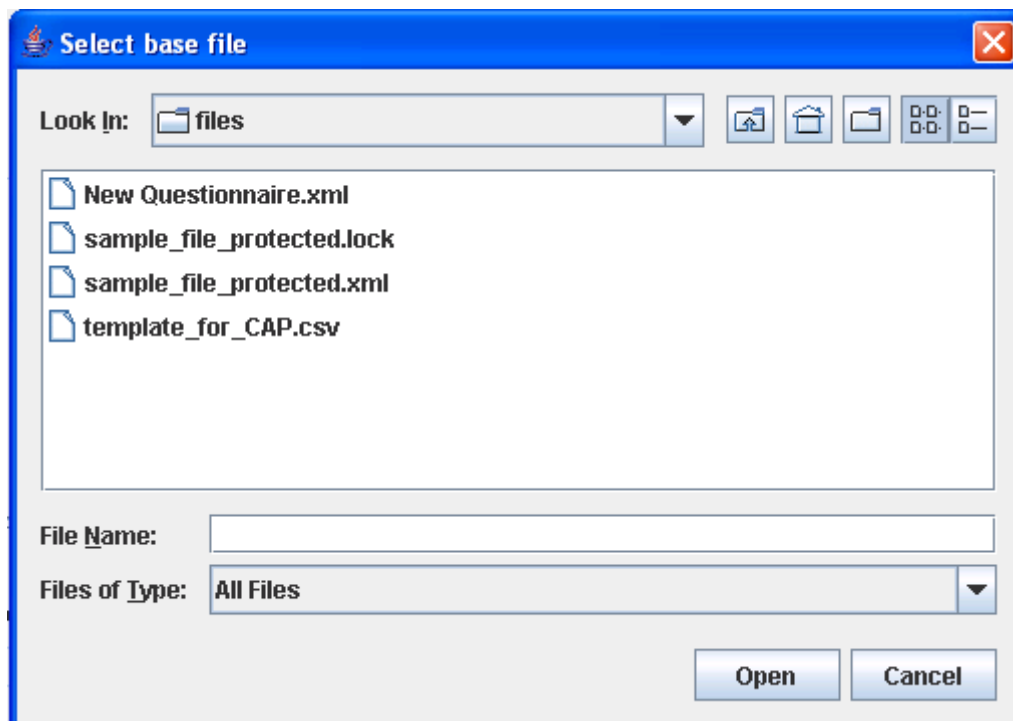


Figure 80: Select base file Dialogue Box

2. Select the base file, and then click **Open**.

The **Select a file to compare with** dialogue box opens.

See the following figure for an example.

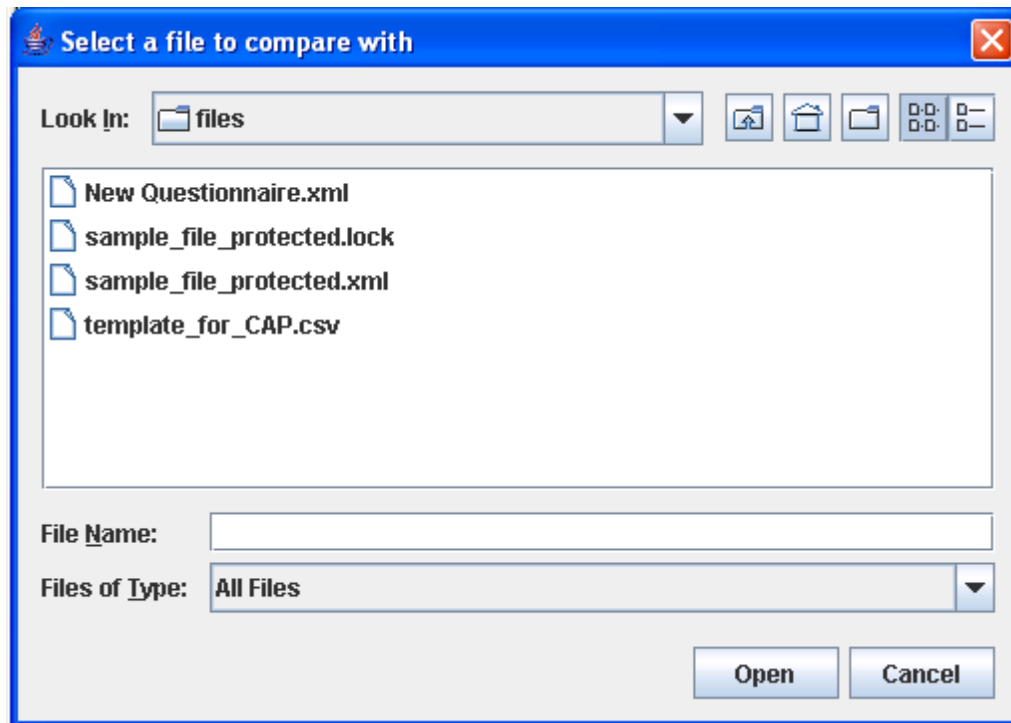


Figure 81: Select a file to compare with Dialogue Box

3. Select a file to compare with, and then click **Open**.

The Gap Analysis displays.

See the following figure for an example.

Base Ctl Group	Base Content	Base: sample_file_pr...	Answers 1: New Ques...
3.1 Managemen...	Has management appointed a member of ...	Yes	Question not found in As...
3.1 Managemen...	Has management determined and provided...	No	Question not found in As...
3.1 Managemen...	Is management managing risks to the orga...	Needs Attention	Question not found in As...
3.1 Managemen...	Has management conducted reviews of ser...	No	Question not found in As...
3.2 Documentati...	Has the organization provided documents a...	Yes	Question not found in As...
3.2 Documentati...	Have staff competencies and training need...	Yes	Question not found in As...
3.2 Documentati...	Has top management ensured that its empl...	Not feedback	Question not found in As...

Figure 82: Gap Analysis

- To export the report to Excel, select **Export to Excel** from the **File** menu.
- To close the report, select **Close** from the **File** menu.

Chapter 5 Tools

This chapter provides you with information and instructions for working with and using the Questions Editor in CAP.

5.1 Question Editor

The question editor is located under the Tools menu in CAP. When selected, the Question Editor opens in a secondary window. From the Question Editor, you can open and edit existing questions files as well as create new questions files from scratch.

When editing or creating questions files, you can add, edit and remove control groups and question content. Additionally, you can create and edit Help content for both questionnaires and individual questions.

When working with questions, you can edit a question's Help text, references documents, evidence collected and skip logic. Skip logic allows you to direct those responsible for completing the questionnaire (interviewers) through the questionnaire based on the interviewee responses.

5.1.1 Opening the Question Editor

To open the Question Editor, complete the following steps.

1. From the **Tools** menu, select **Question Editor**.

See the following figure for an example.

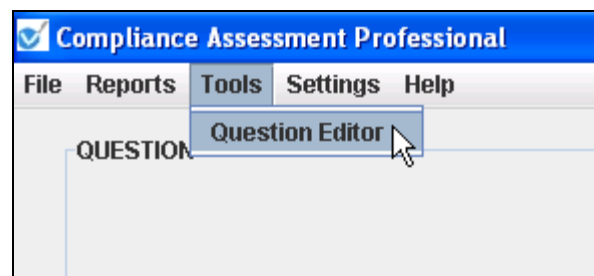


Figure 83: Opening the Question Editor

The **Question Editor** opens in a secondary window.

See the following figure for an example.

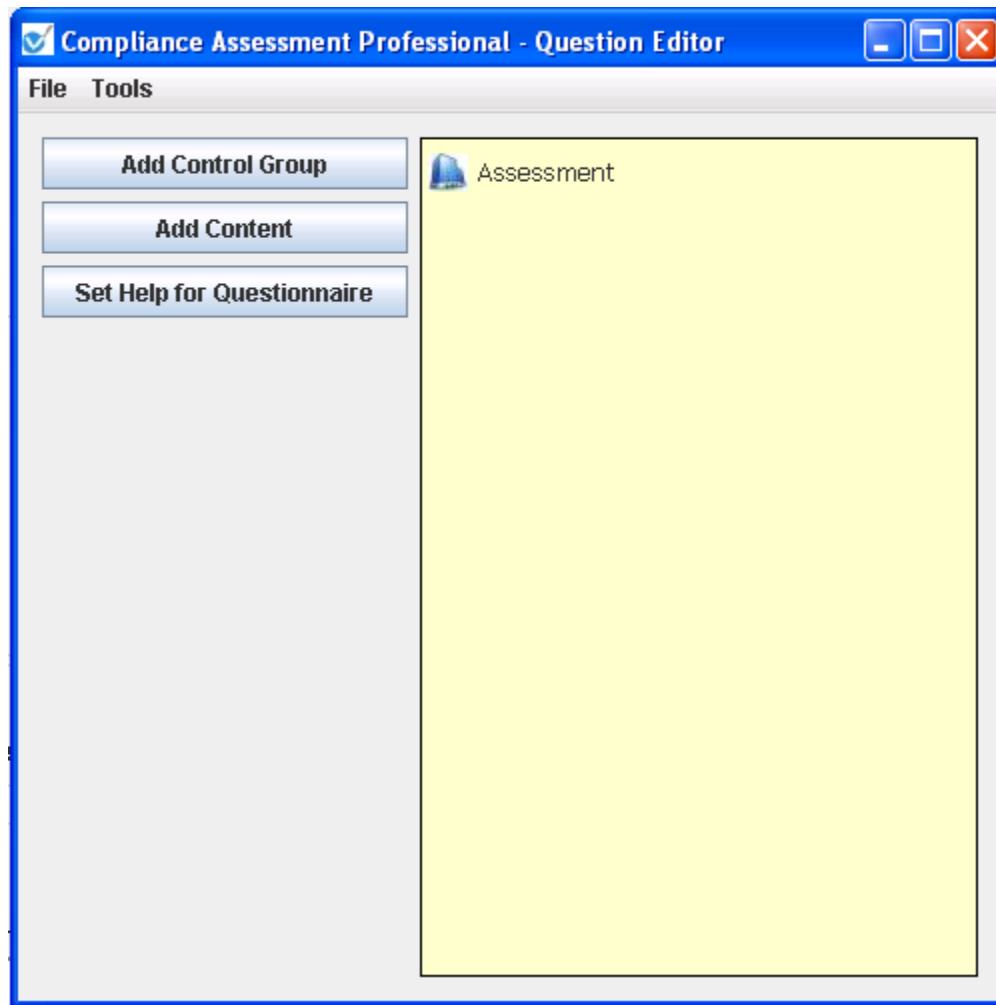



Figure 84: Question Editor - Secondary Window

5.1.2 Exiting the Question Editor

 **Note:** Remember to save your changes before exiting the Question Editor. To exit the Question Editor, a secondary window, do following.

- From the **File** menu, select **Exit**.

5.1.3 Creating a New Assessment File

To create a new questions file, complete the following steps.

1. From the **File** menu of the Question Editor, select **New**.

See the following figure for an example.

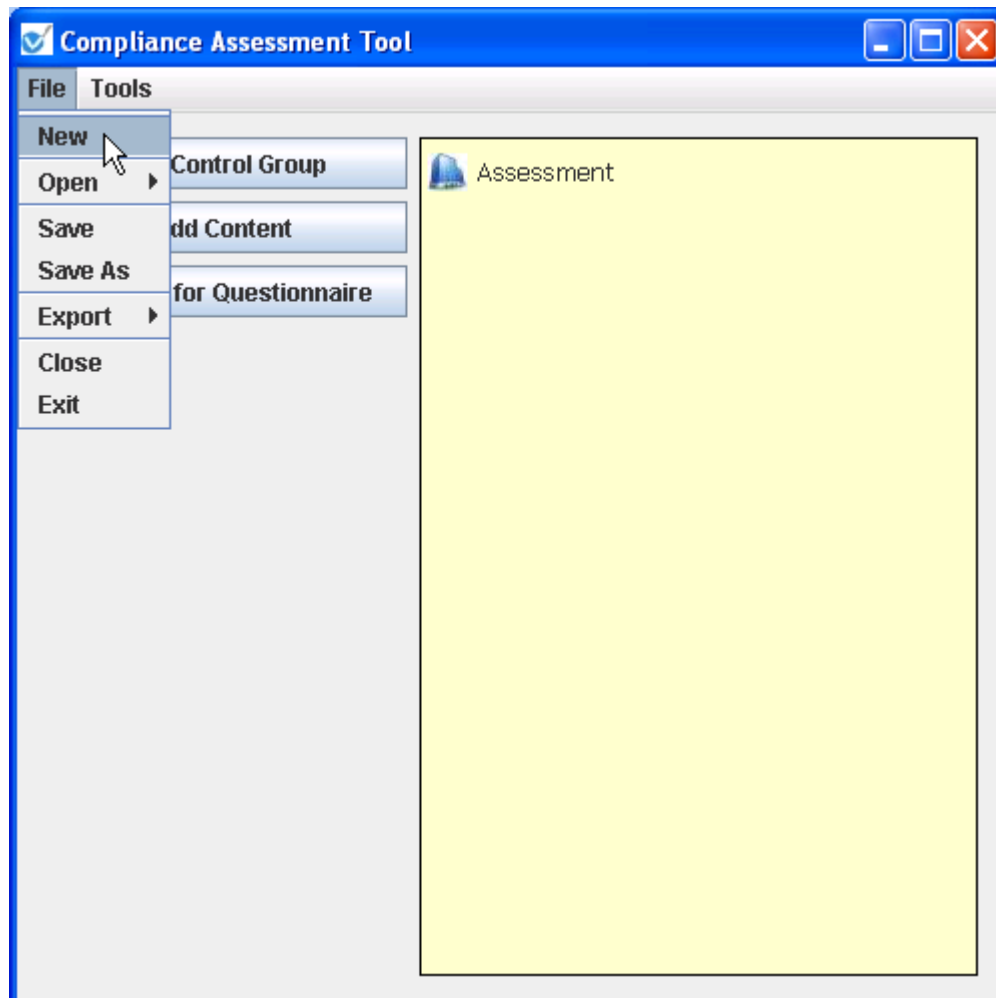


Figure 85: Creating a New Assessment File

5.1.4 See section 5.1.9 Converting an Assessment File

To convert an assessment file, complete the following steps.

2. From the Tool menu of the Question Editor, select **Converter**.

See the following figure for an example.

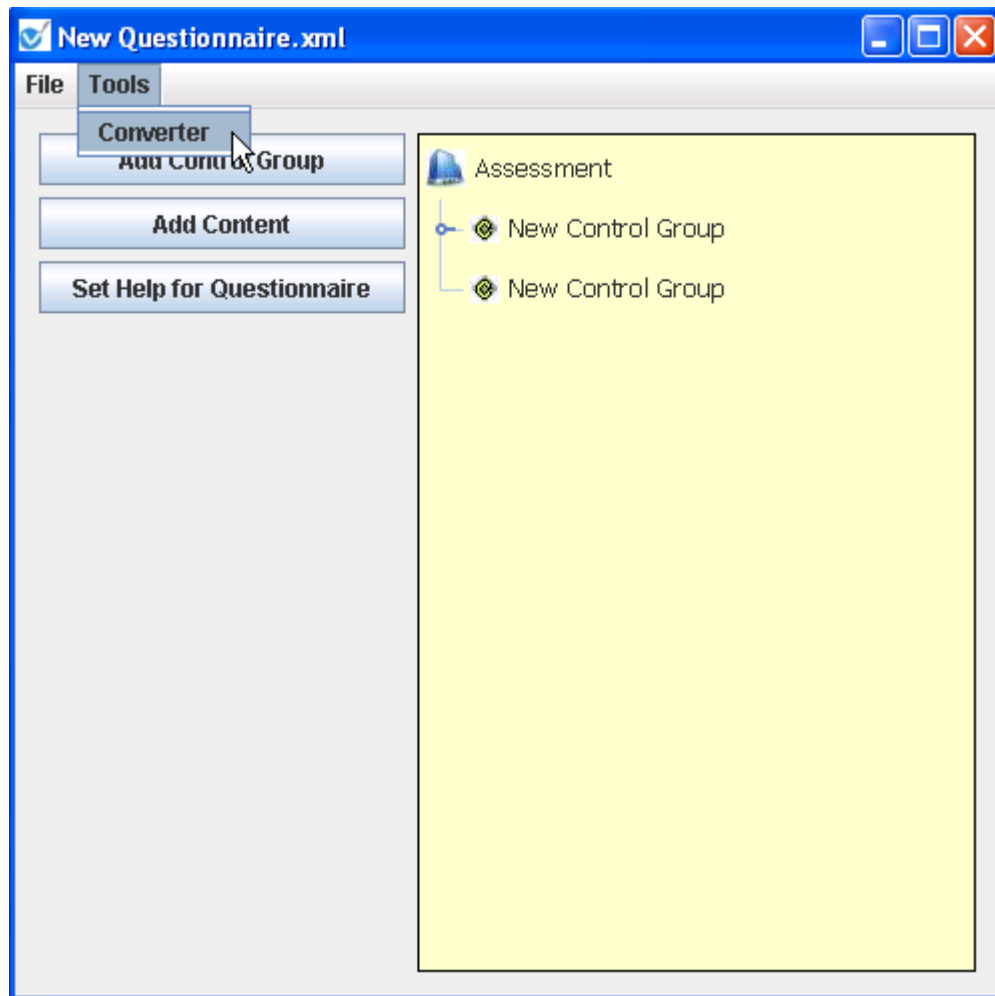


Figure 90: Converting an Assessment File

The ***select old assessment file to convert*** dialogue box opens.

See the following figure for an example.

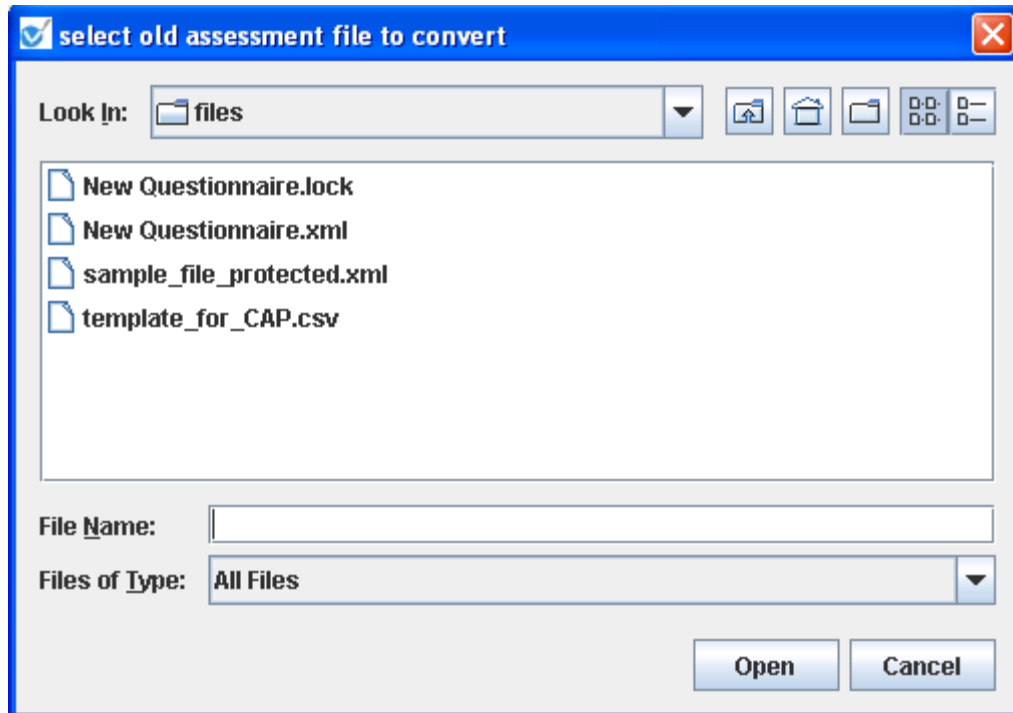


Figure 91: select old assessment file to convert Dialogue Box

3. Select the old assessment file you would like to convert, and then click **Open**.
The **Input** dialogue box opens.
See the following figure for an example.

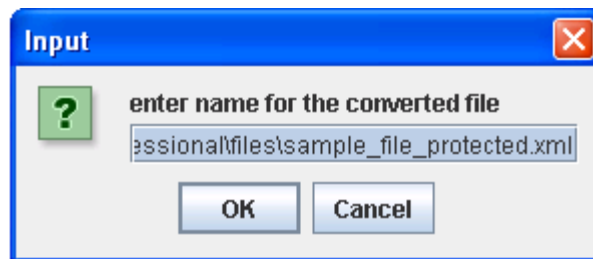


Figure 92: Input Dialogue Box

4. Enter the name for the converted file, and then click **OK**.
The **File Converted** dialogue box opens showing the location.
5. Click **OK**.
The file has been successfully converted and the File Converted dialogue box closes.
Working with Assessment Files for information and instruction on working with questions files.

5.1.5 Opening an Existing Assessment File

To open an existing questions file, complete the following steps.

1. From the **File** menu of the Question Editor, select **Open**, and then select the file type (either **XML** or **CSV**).

See the following figure for an example.

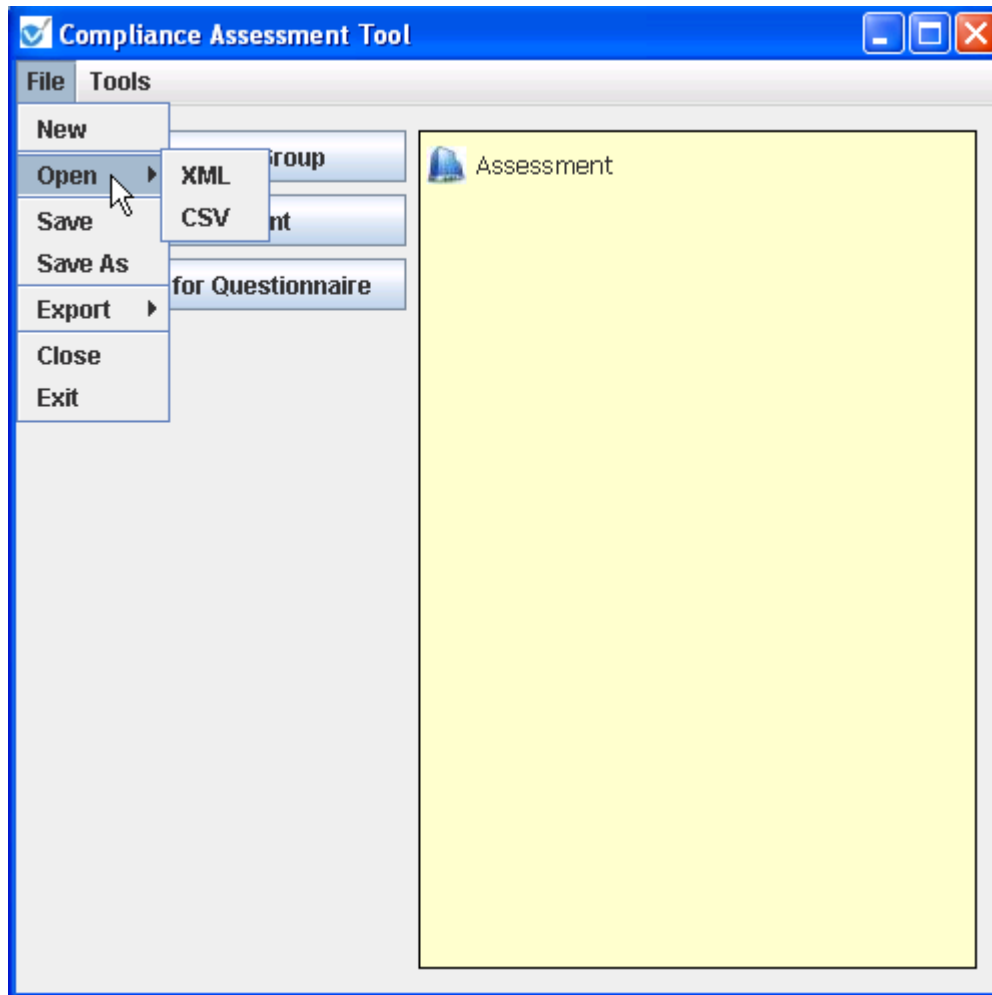


Figure 86: Opening an Existing Questions File

The **Open** dialogue box opens.

See the following figure for an example.

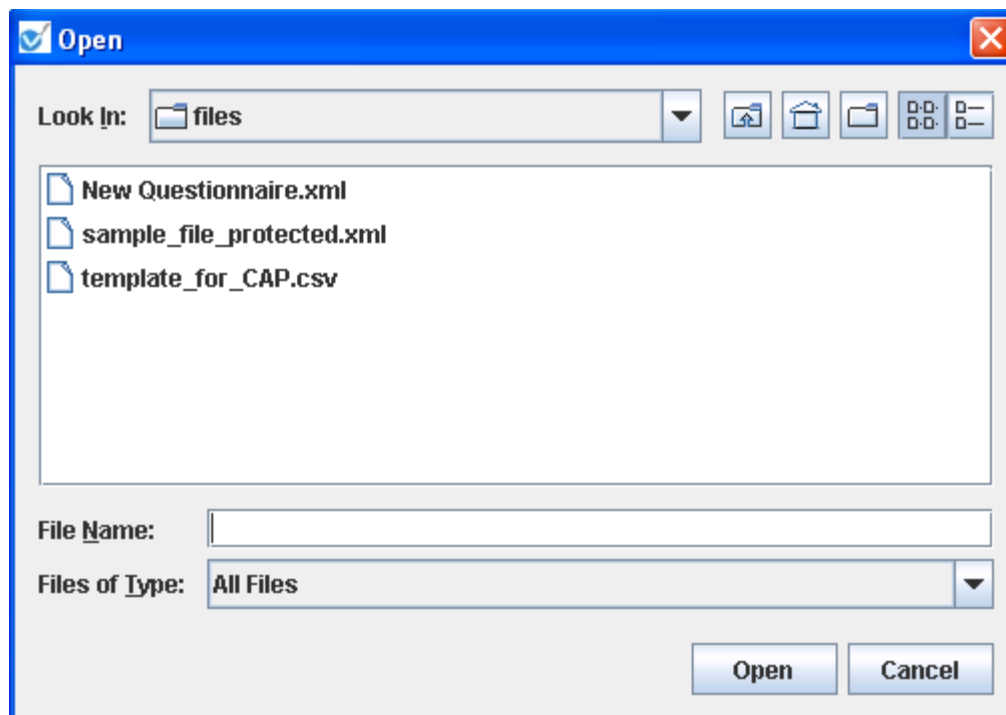


Figure 87: Open Dialogue Box

2. Select the file you want to open and then click **Open**.

The file opens in the Question Editor.

5.1.6 Saving an Assessment Files

To save a questions file, do the following.

- From the **File** menu of the Questions Editor, select **Save** or **Save As**.

5.1.7 Exporting an Assessment File to CSV

To export a questions file to CSV, complete the following steps.

1. Open the file that you want to export by following the steps in section 5.1.5 Opening an Existing Assessment File.
2. From the **File** menu of the Question Editor, select **Export**, and then **Export to CSV**.

See the following figure for an example.

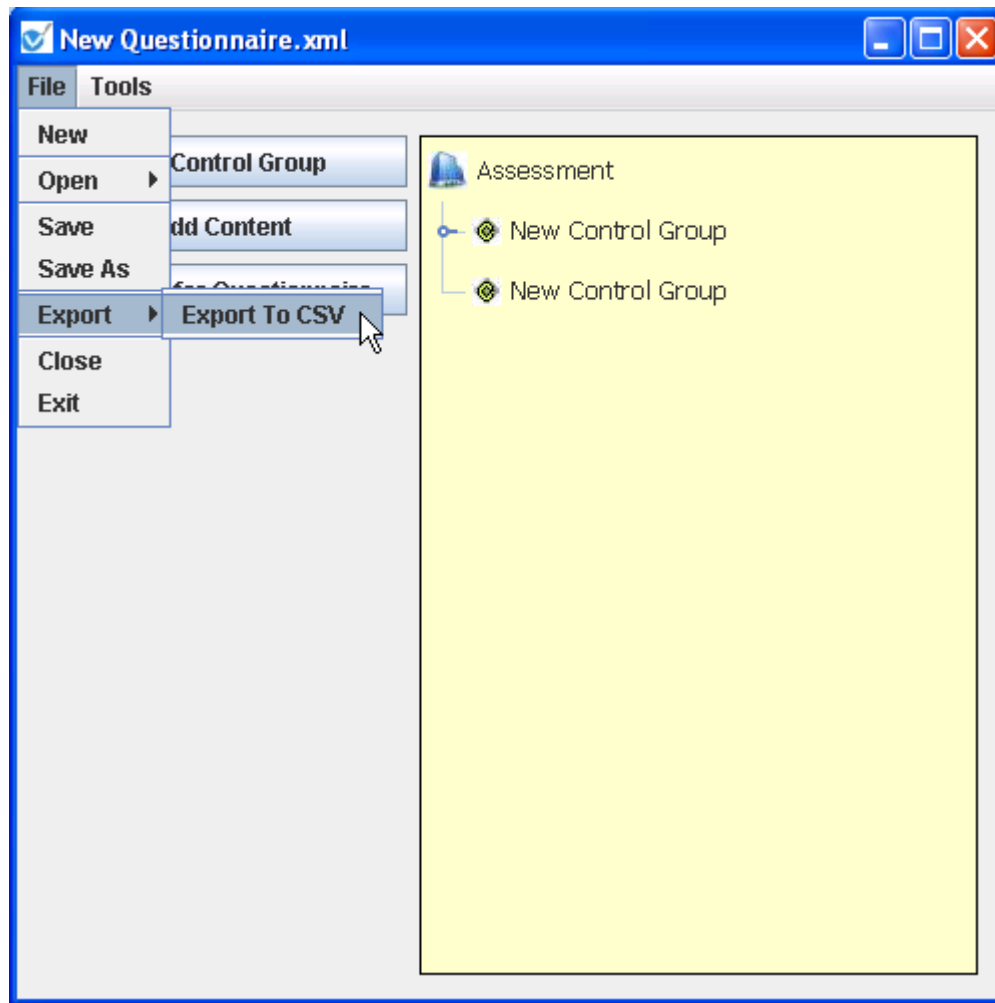


Figure 88: Exporting a Questions File to CSV

The **Save** dialogue box opens.

See the following figure for an example.

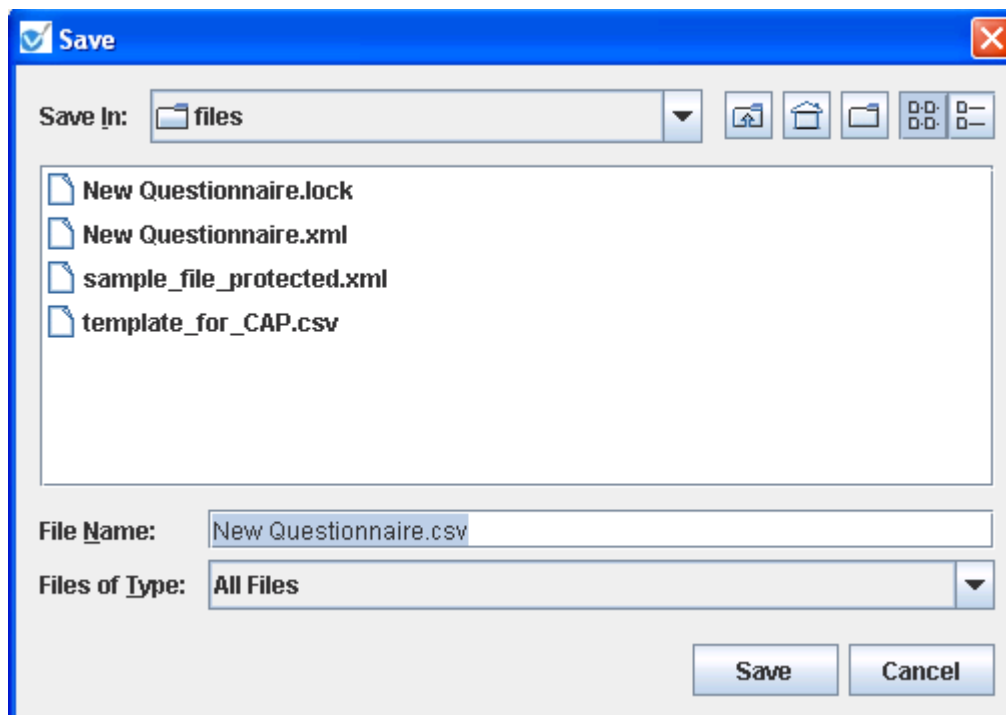


Figure 89: Save Dialogue Box

3. Enter the name of the CSV file and the location where you want to save the CSV file, and then click **Save**.

The questions file is exported in CSV format to the selected location.

5.1.8 Closing an Assessment File

Remember to save your changes before closing a questions file.

To close a questions file, do the following.

- From the **File** menu of the Question Editor, select **Close**.

5.1.9 Converting an Assessment File

To convert an assessment file, complete the following steps.

1. From the Tool menu of the Question Editor, select **Converter**.

See the following figure for an example.

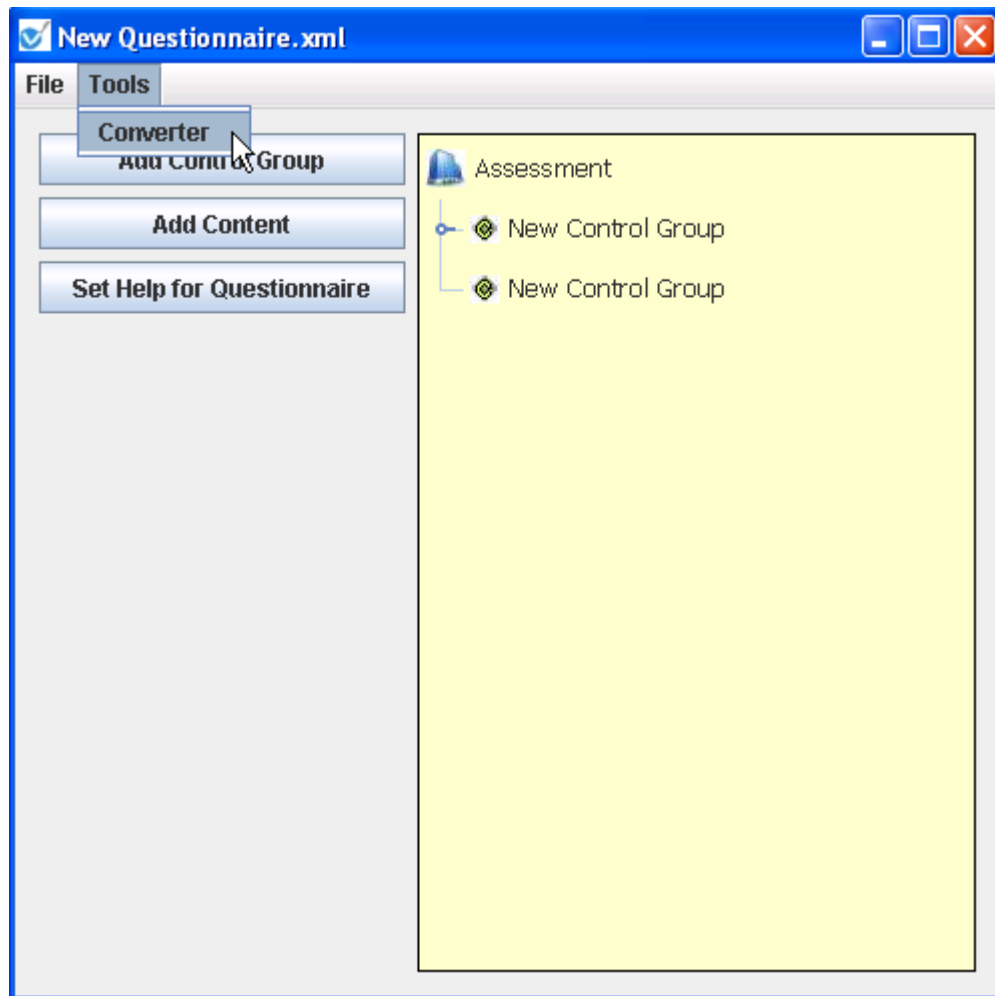


Figure 90: Converting an Assessment File

The select old assessment file to convert dialogue box opens.

See the following figure for an example.

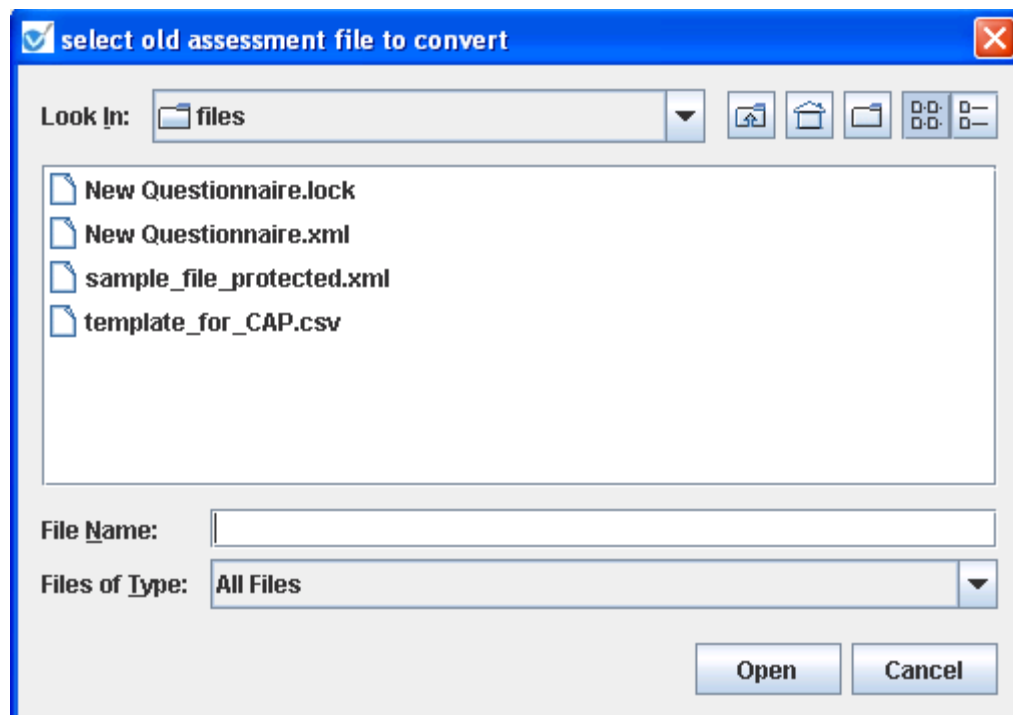


Figure 91: select old assessment file to convert Dialogue Box

2. Select the old assessment file you would like to convert, and then click **Open**.
The **Input** dialogue box opens.
See the following figure for an example.



Figure 92: Input Dialogue Box

3. Enter the name for the converted file, and then click **OK**.
The **File Converted** dialogue box opens showing the location.
4. Click **OK**.
The file has been successfully converted and the File Converted dialogue box closes.

5.1.10 Working with Assessment Files

CAP provides you with the ability to create new and edit existing questions files. When working with a questions file, you can add, edit and remove control groups and questions content.

5.1.10.1 Adding Control Groups

To add a control group to a questions file, complete the following steps.

1. Do one of the following.
 - Click Add Control Group
 - Or –
 - Right-click **Assessment**, and then select **Add Control Group**

See the following figure for an example.

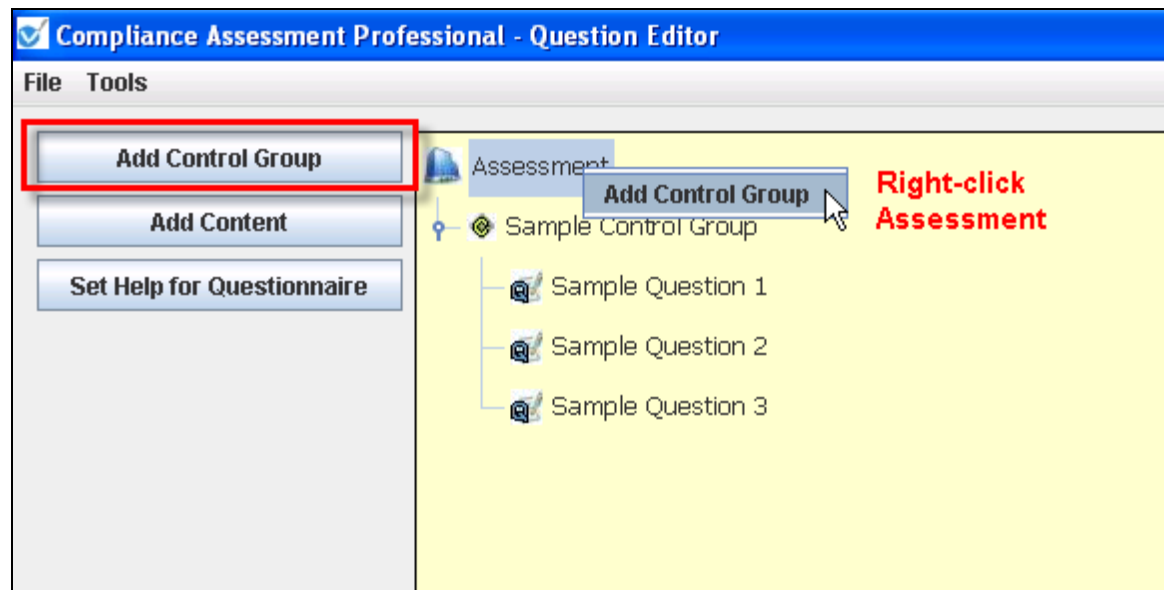


Figure 93: Adding Control Groups

The **Control** dialogue box opens.

See the following figure for an example

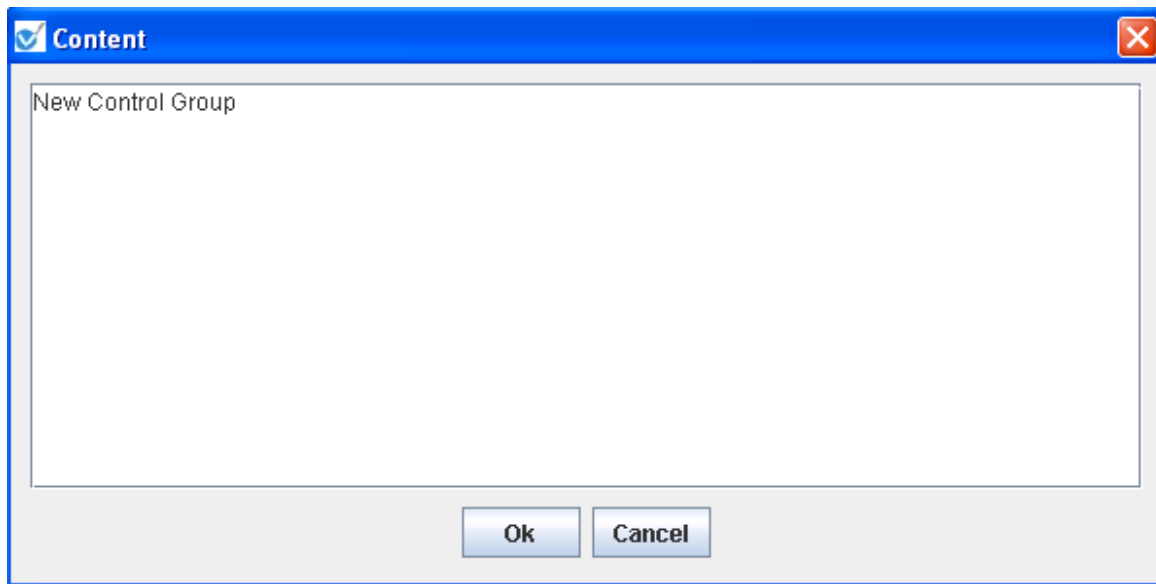


Figure 94: Control Dialogue Box

2. Rename the Control Group, and then click **OK**.
The newly added control group displays in the assessment list.

5.1.10.2 Removing a Control Group

To remove a control group, complete the following steps.

1. Right-click the control group, and then select **Remove**.

See the following figure for an example.

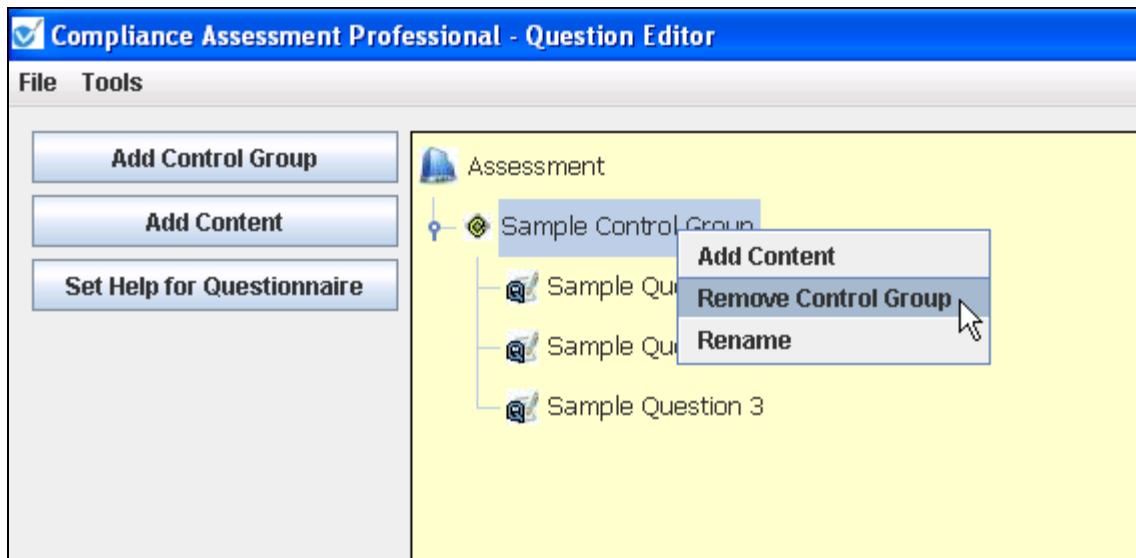


Figure 95: Removing a Control Group

5.1.10.3 Renaming a Control Group

To rename a control group, complete the following steps.

1. Right-click the control group, and then select **Rename**.

See the following figure for an example.

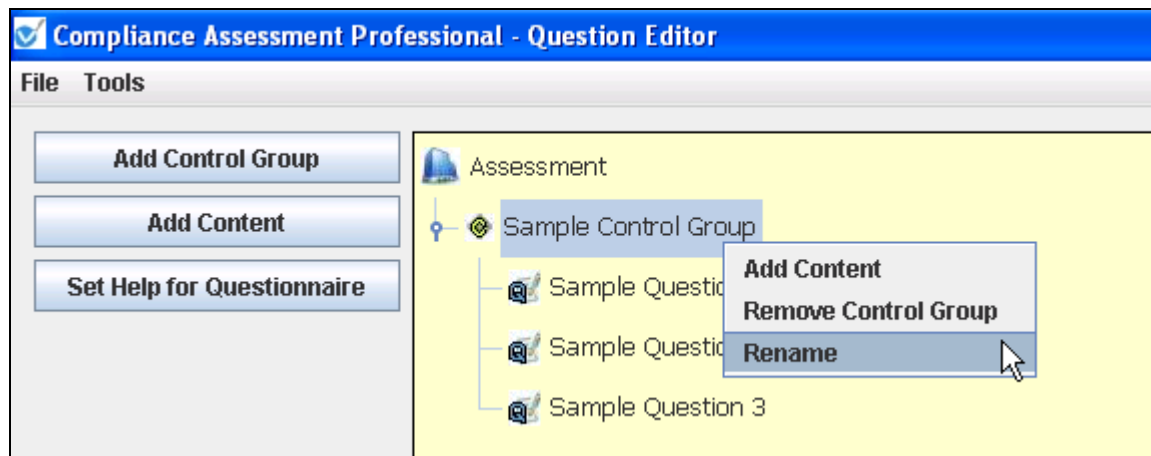


Figure 96: Renaming a Control Group

2. Rename the control group, and press **ENTER**.

5.1.10.4 Adding Content

To add content, complete the following steps.

1. Select the Control Group, and then do one of the following.
 - Click Add Control.
 - Or –
 - Right-click the Control Group, and then select **Add Content**.

See the following figure for an example.

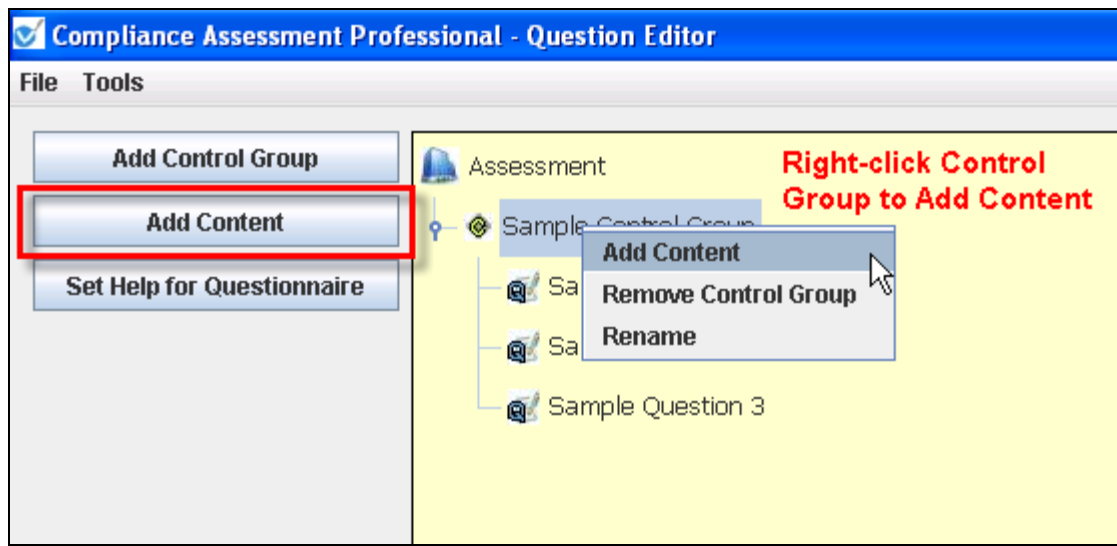


Figure 97: Adding Content

The **Content** dialogue box opens.

See the following figure for an example.

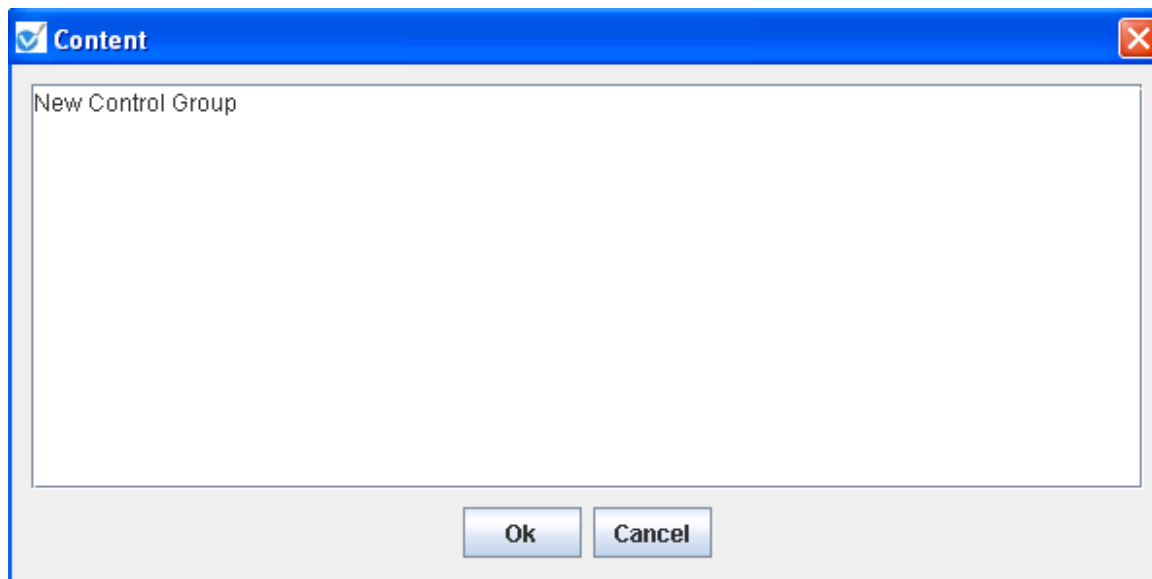


Figure 98: Content Dialogue Box

2. Enter the Content details, and then click **OK**.

The newly added content displays in the Assessment list.

5.1.10.5 Renaming Content

To rename content, complete the following steps.

1. Right-click the content you want to rename, and then select **Rename**.

See the following figure for an example.

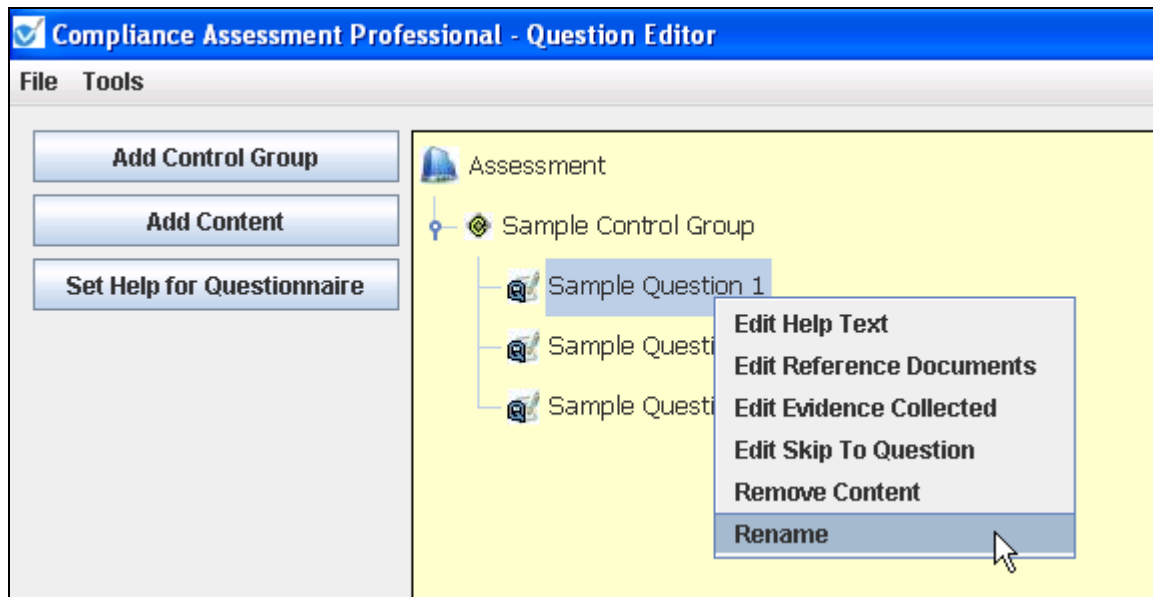


Figure 99: Renaming Content

2. Enter the new contact name, and then press ENTER.

The new content name displays.

5.1.10.6 Removing Content

To remove content, complete the following steps.

1. Right-click the content you want to remove, and then select **Remove Content**.

See the following figure for an example.

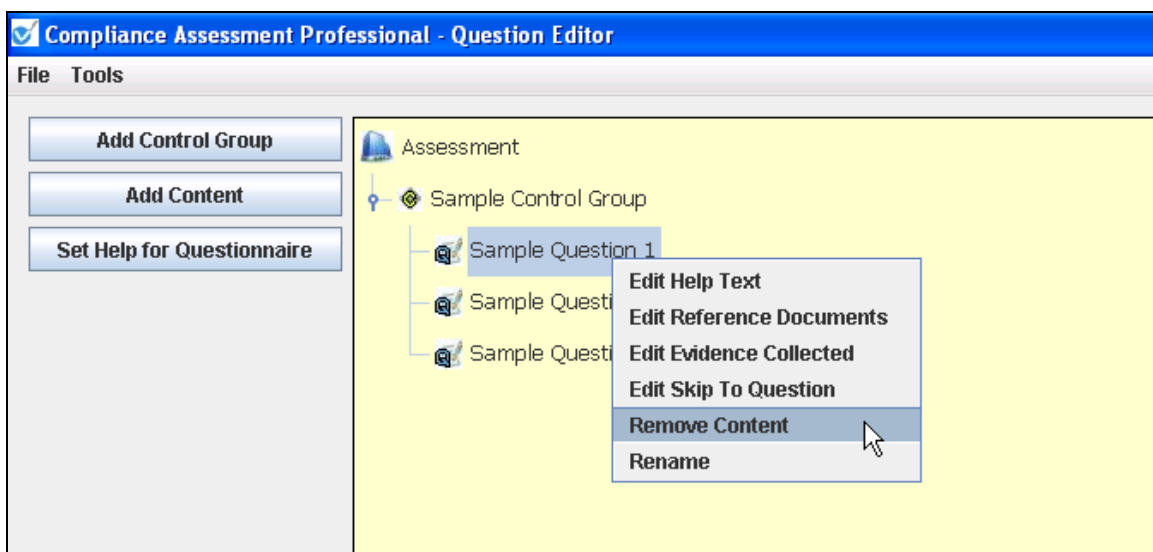


Figure 100: Removing Content

The content is removed from the Assessment list.

5.1.10.7 Editing Help Text

You can edit Help text for the entire Questionnaire and for individual questions.

- To set Help for the Questionnaire see section 5.1.10.7.1.
- To edit Help for an individual question, see section 5.1.10.7.2.

5.1.10.7.1 Setting Help for a Questionnaire

To set Help for a Questionnaire, complete the following steps.

1. From the Question Editor, click **Set Help for Questionnaire**.

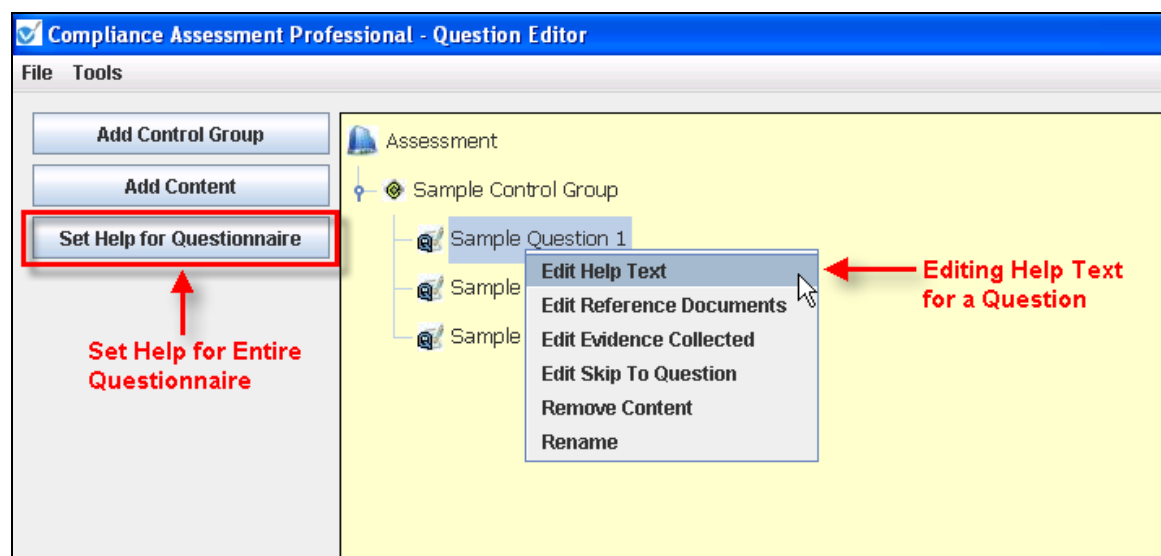


Figure 101: Setting Help for Questionnaire

The *Enter in Help Text for the Entire Questionnaire* dialogue box opens.

See the following figure for an example.

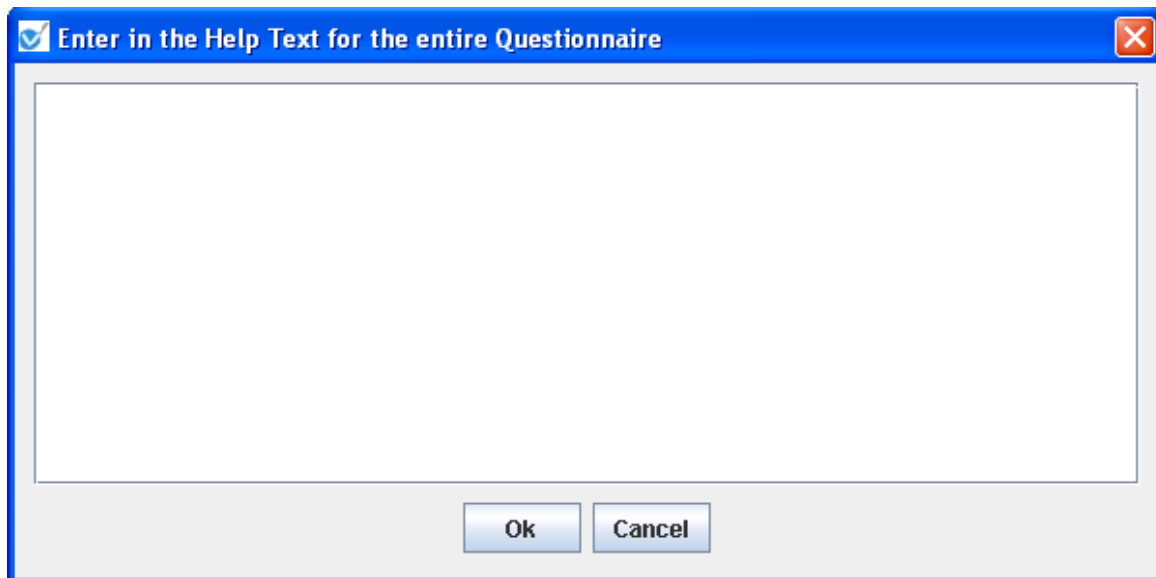


Figure 102: Entering Help Text for the entire Questionnaire Dialogue Box

2. Enter the Help text, and then click **OK**.

5.1.10.7.2 Editing Help Text for a Question

To edit Help text for an individual question, complete the following steps.

1. Right-click the question, and select **Edit Help Text**.

See the following figure for an example

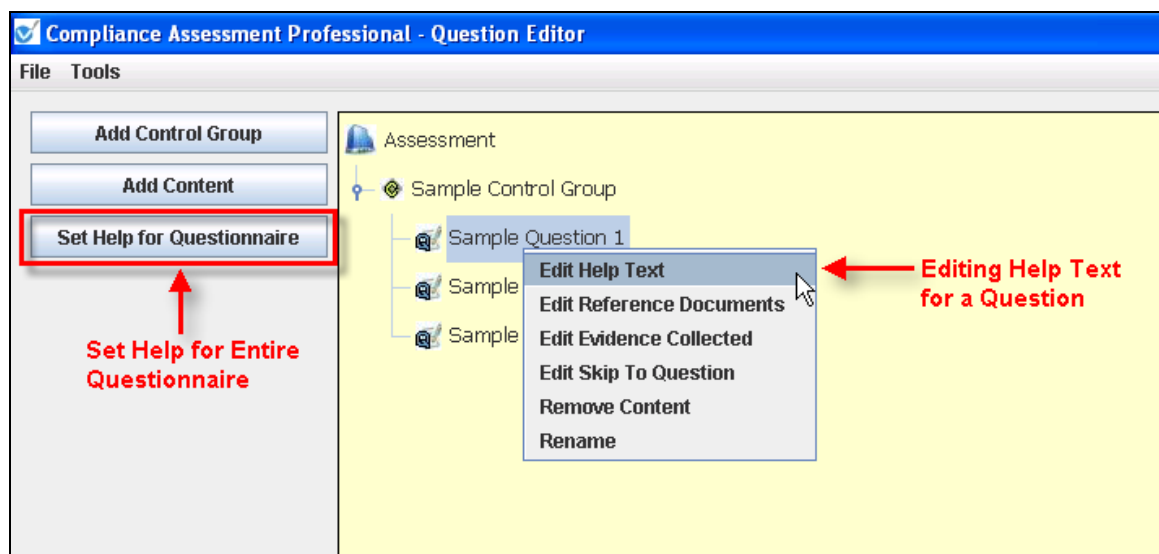


Figure 103: Editing Help Text for a Question

The ***Enter in the Help Text for the selected Question*** dialog box opens.

See the following figure for an example.

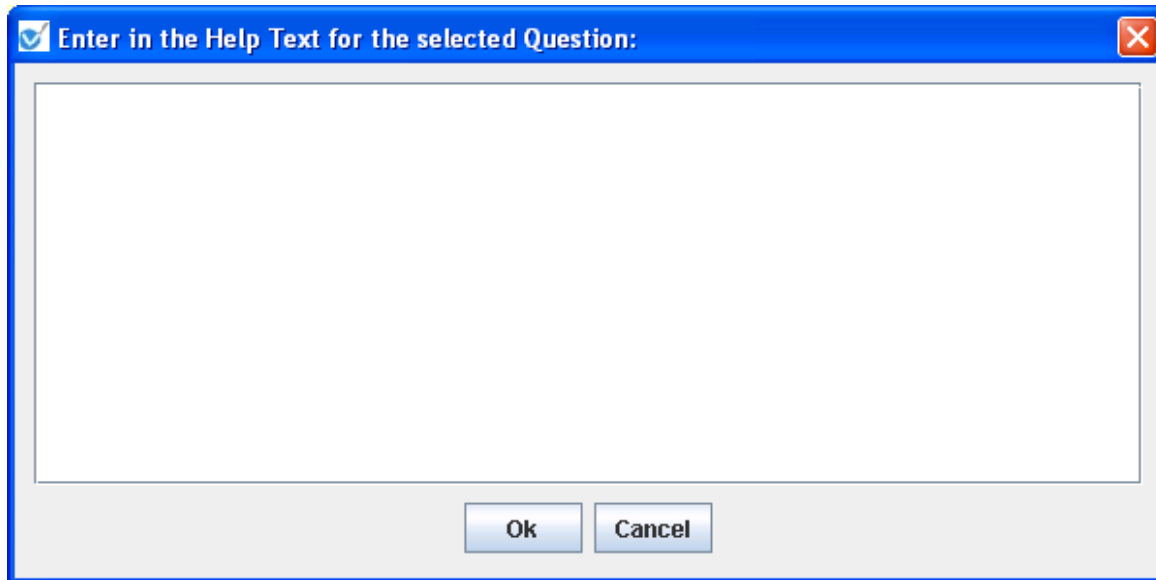


Figure 104: Enter in the Help Text for the selected Question Dialogue Box

2. Enter the Help text for the selected question, and then click **OK**.
The Help text is saved.

5.1.10.8 Editing Reference Documents

To edit Help text for an individual question, complete the following steps.

1. Right-click the question, and select **Edit Reference Documents**.

See the following figure for an example

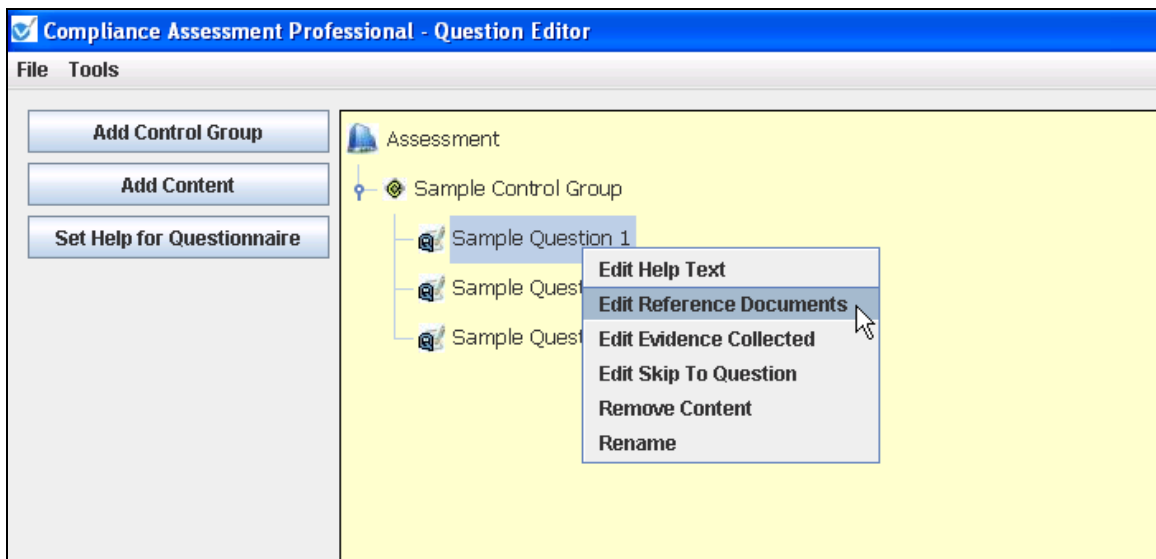


Figure 105: Editing Reference Documents for a Question

The *Enter in the Reference Documents for the selected Question* dialogue box opens.

See the following figure for an example.

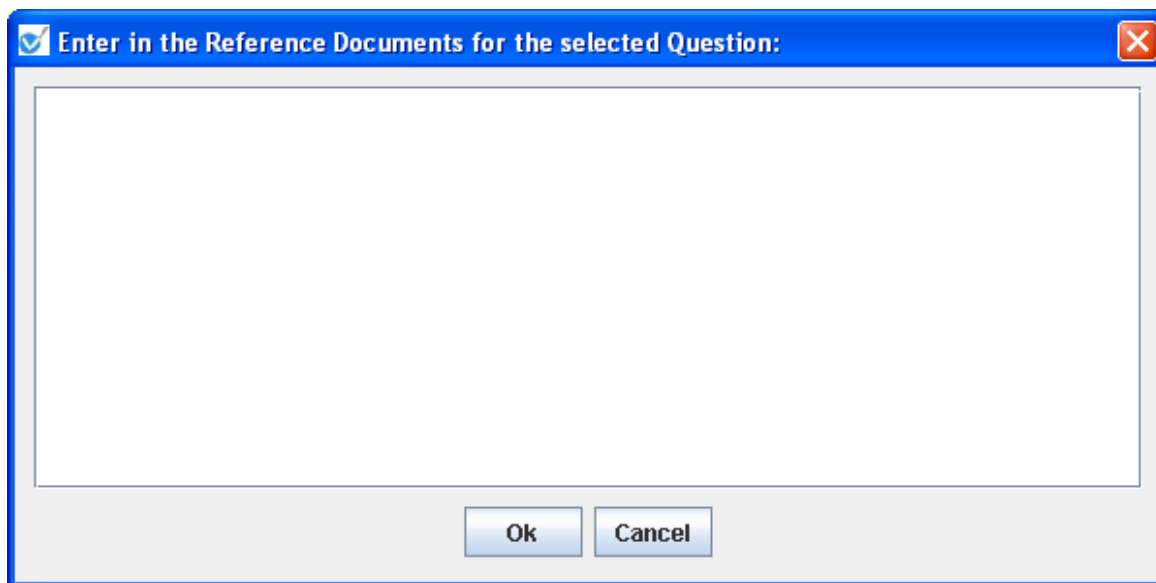


Figure 106: Enter in the Reference Documents for the selected Question Dialogue Box

2. Enter the reference document(s) for the selected question, and then click **OK**.
The reference document(s) are saved.

5.1.10.9 Editing Evidence Collected

To edit text for an individual question, complete the following steps.

3. Right-click the question, and select **Edit Evidence Collected**.

See the following figure for an example

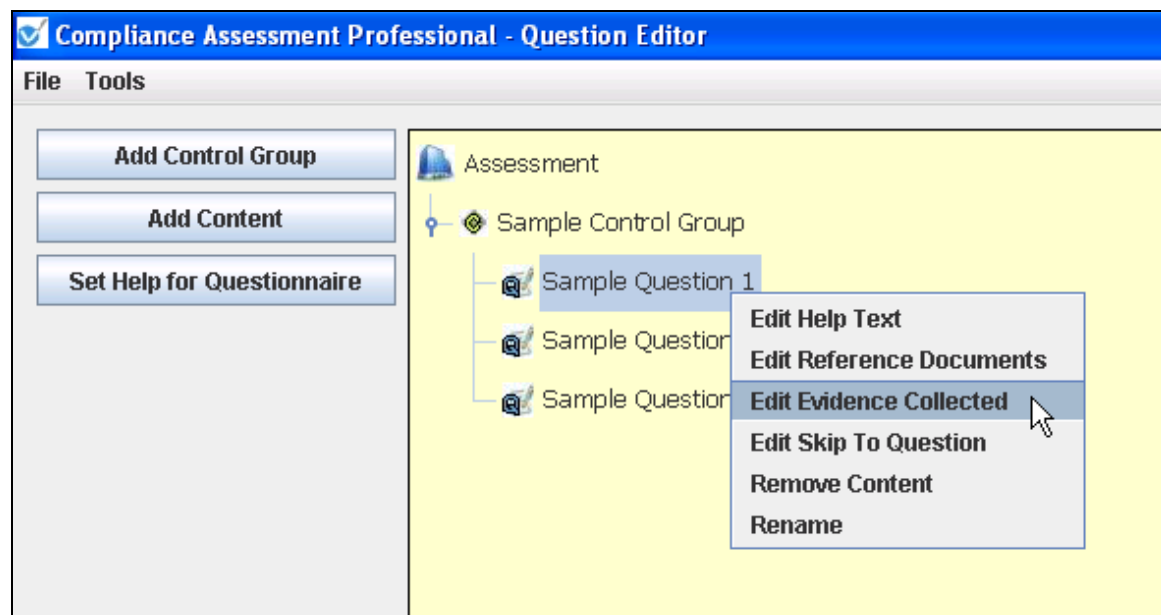


Figure 107: Editing Evidence Collected for a Question

The *Enter in the Evidence Collected for the selected Question* dialogue box opens.

See the following figure for an example.

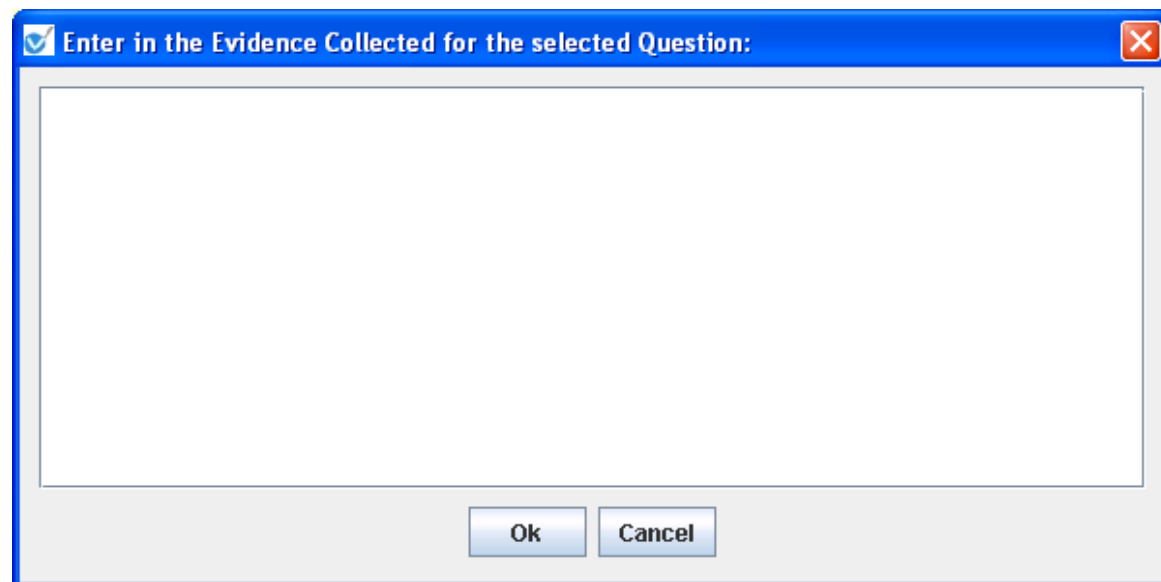


Figure 108: Enter in the Evidence Collected for the selected Question Dialogue Box

4. Enter the Evidence Collected for the selected question, and then click **OK**.

The evidence collected is saved.

5.1.10.10 Editing Skip Logic

Skip logic allows you to direct those responsible for completing the questionnaire (interviewers) through the questionnaire based on the interviewee responses.

To edit skip logic, complete the following steps.

1. Right-click the question, and select **Skip To Question**.

See the following figure for an example

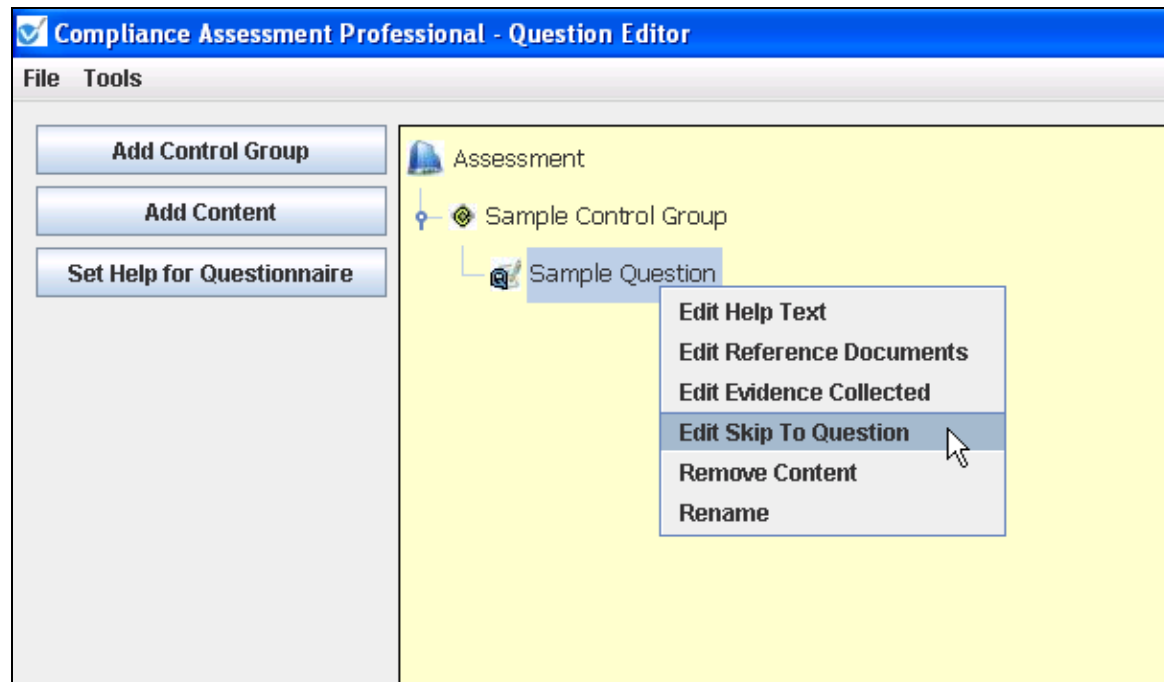


Figure 109: Editing Skip Logic for a Question

The **Skip To Question** dialogue box opens.

See the following figure for an example.

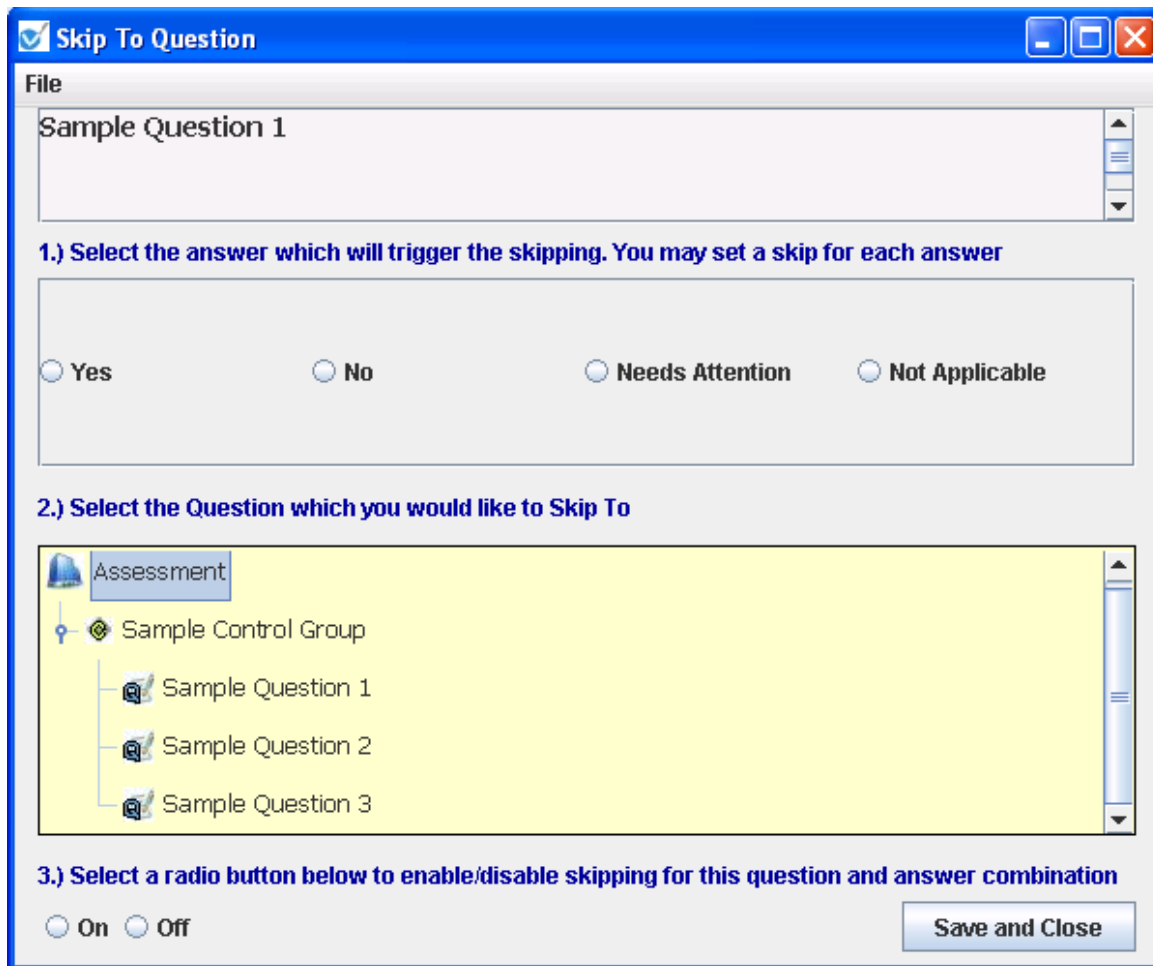


Figure 110: Skip To Question Dialogue Box

2. Select the answer that will trigger the skipping.

See the following figure for an example.

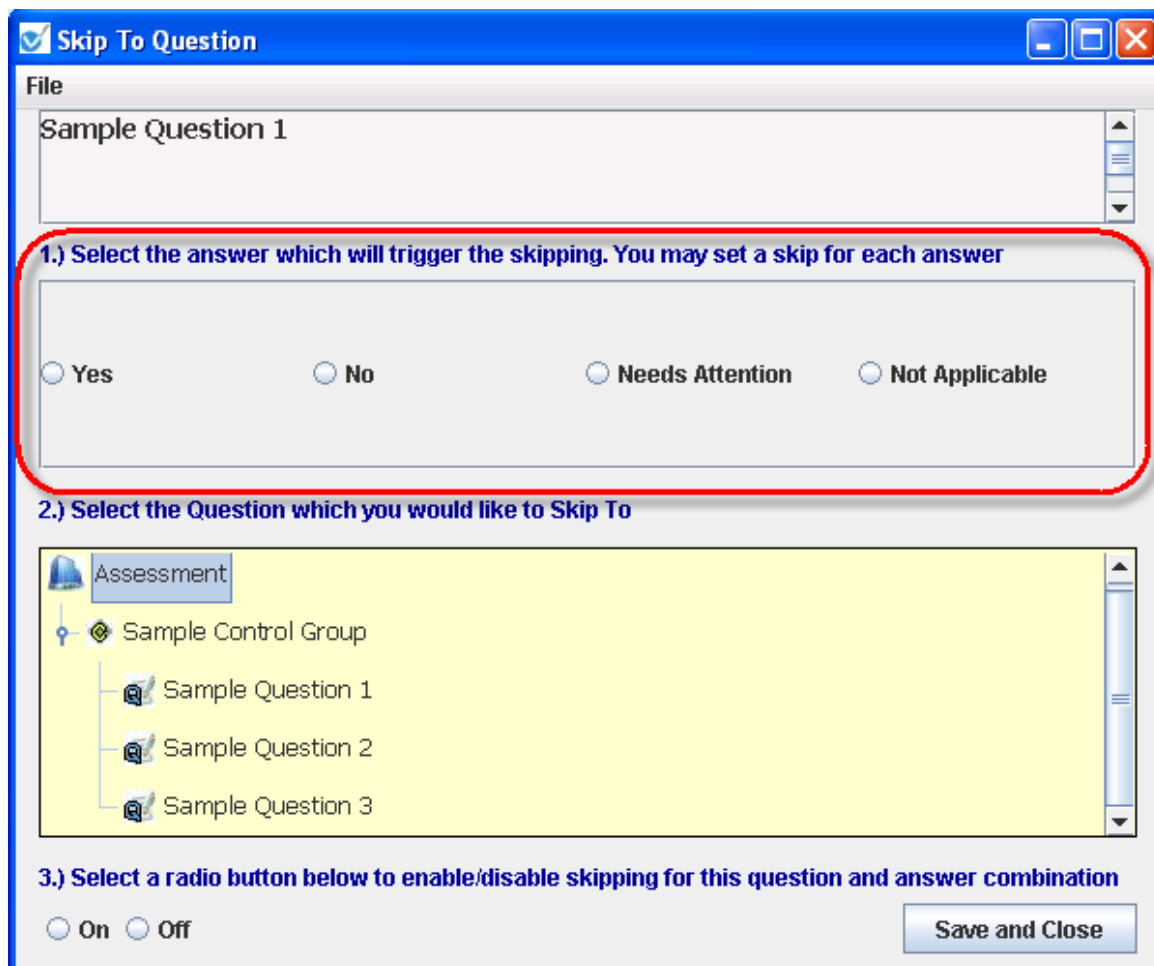



Figure 111: Selecting the Answer That Triggers Skip

 **Note:** You can set skip logic for each answer.

3. Select the question that you would like to skip to.

See the following figure for an example.

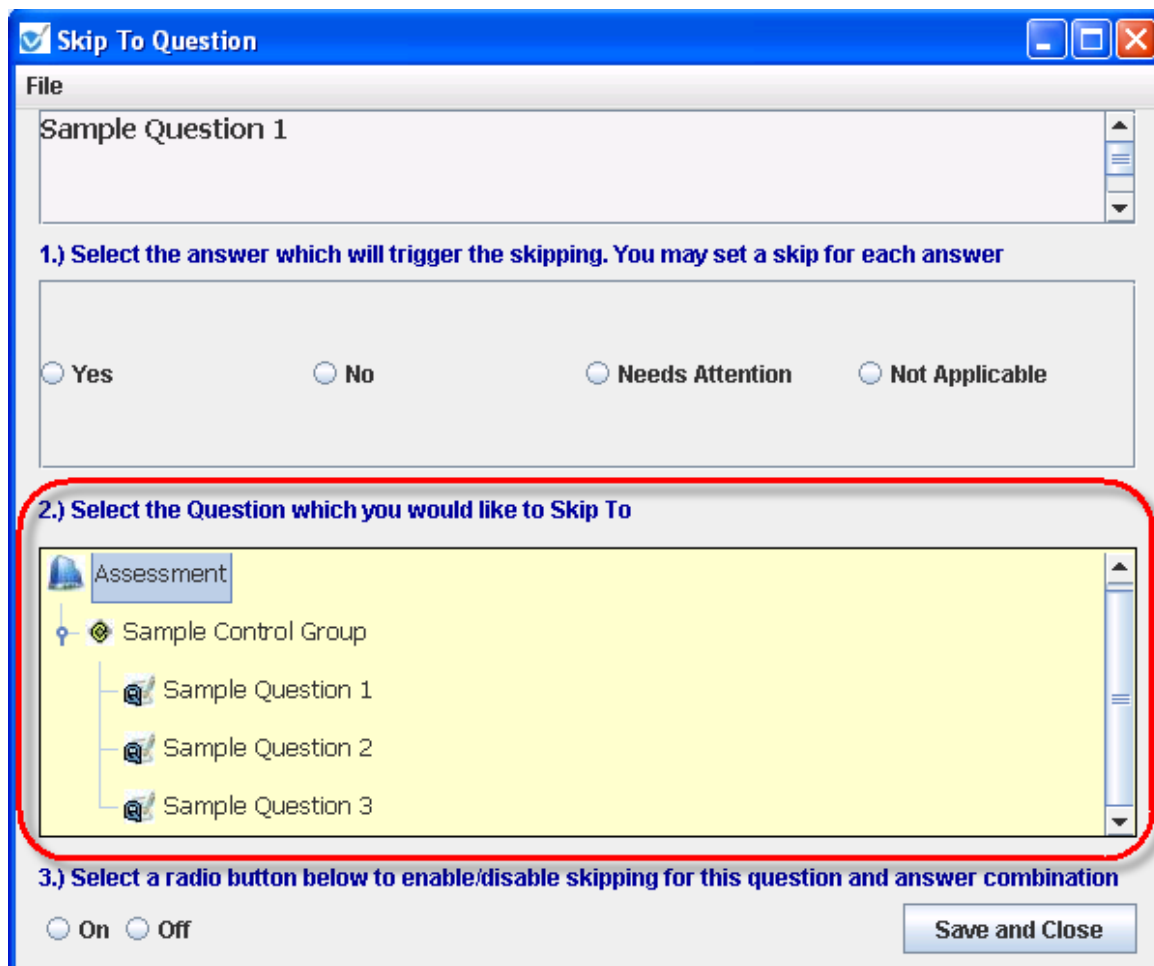


Figure 112: Selecting the Question to Skip To

4. Select **On** to enable or **Off** to disable the skip logic, and then click **Save and Close**.

The skip logic is saved for the selected question and the **Skip To Question** dialogue box closes.

Chapter 6 Help

This chapter provides you with information and instructions for using the Help feature. Help allows you to view current CAP version information and appropriate contact and copyright information. Additionally, you can check for program updates as well as configure updates.

6.1 About CAP

To view current CAP version information and appropriate contact and copyright information, do the following.

1. From the **Help** menu, click **About**.

See the following figure for an example.

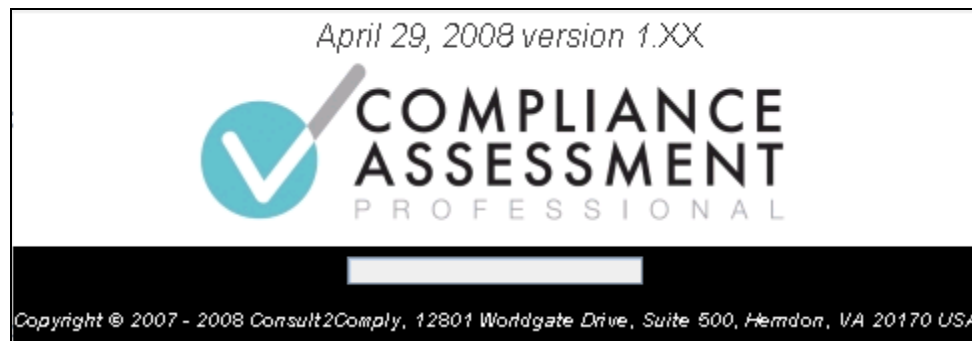


Figure 113: Help -About CAP – Example

6.2 Checking for Updates

When checking for updates, RAP sends a request to the Consult2Comply server. If a program update is found, a prompt will ask if you would like to update your application. You decide how often RAP performs these checks.

! **Important:** RAP will check for updates only when an Internet network connection is found.

To check for program updates, complete the following steps.

1. From the **Help** menu, click **Check for Updates**.

See the following figure for an example

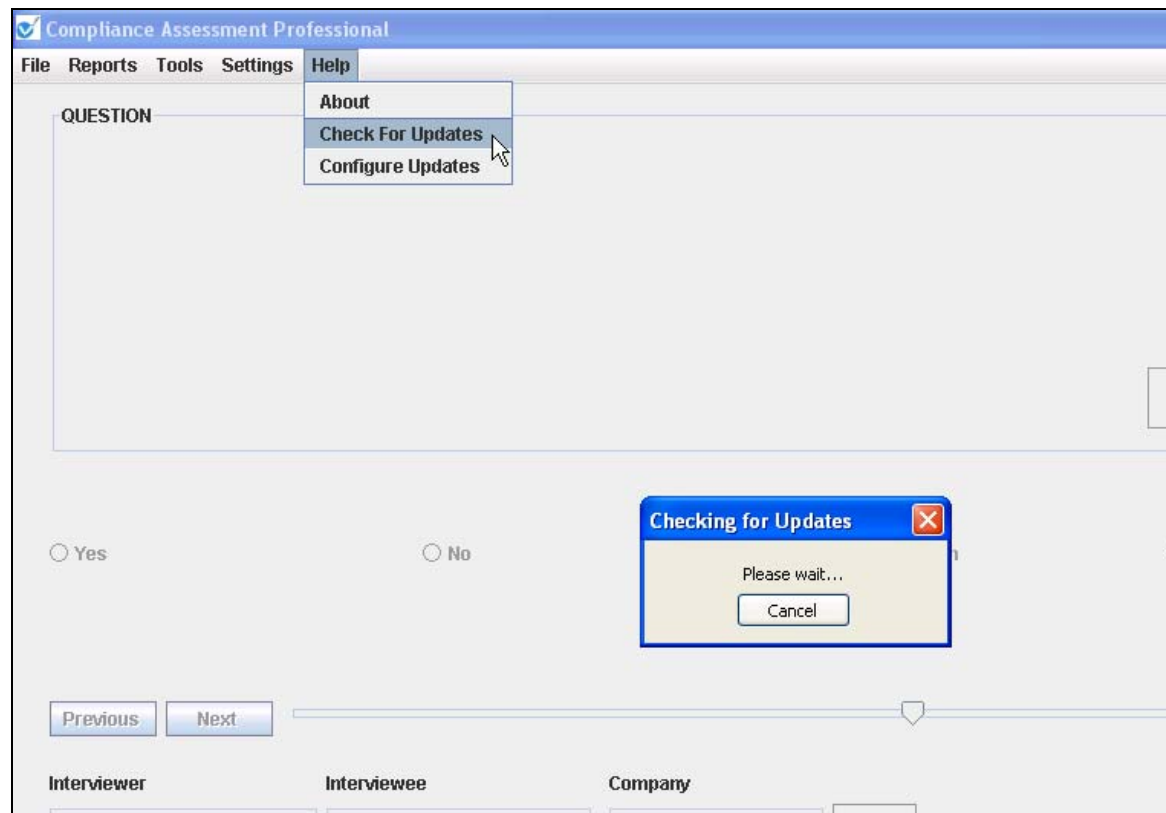


Figure 114: Checking for Updates

If updates are available, the **Choose Updates to Install** dialogue box opens.

See the following figure for an example.

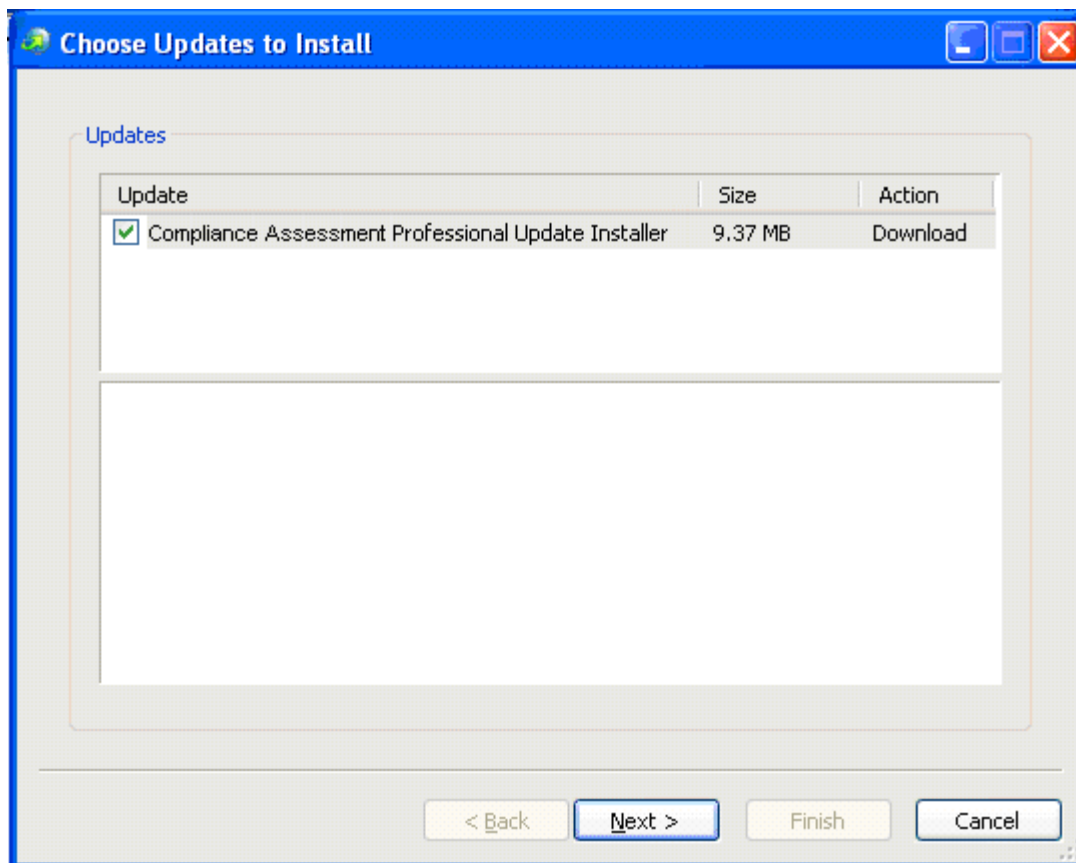



Figure 115: Choosing Updates to Install - Example Update

 **Note:** You can cancel the download / installation at any time by clicking **Cancel**.

2. Click **Next** to download and install the update, and then following the instructions.

6.3 Configuring Updates

6.3.1.1 Setting Update Frequency

When setting the update frequency, you can choose to check for updates each time you start the application, every day, every week or every month.

To set the update frequency, do the following.

- From the General tab of the **Preference** dialogue box, select the update frequency that you prefer, and then click **Save/Close**.

To configure CAP program updates, complete the following steps.

1. From the **Help** menu, click **Configure Updates**.

The **Updates Options** dialogue box opens.

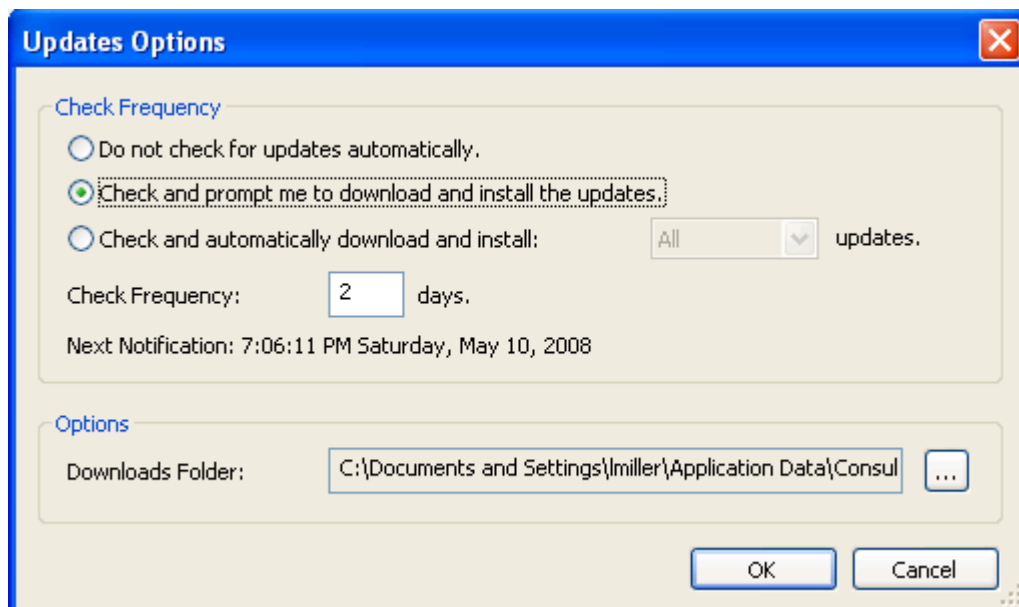


Figure 116: Updates Options Dialogue Box

You can manage how often checks are made for RAP program updates using the Check Frequency section of the **Updates Options** dialogue box. Additionally, you can specify the download folder location for your application updates from the Options section of the **Updates Options** dialogue box.

2. Make change as desired, and then click **OK**.

CAP saves your changes, and then the **Updates Options** dialogue box closes.

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