Security Assessment Questionnaire

User Guide

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Preface

Welcome to Qualys Cloud Platform! In this guide, we'll show you how to use the Qualys Security Assessment Questionnaire to streamline your third-party and internal risk assessment processes and to design in-depth surveys to assess security policies and practices of third parties and internal staff, and their compliance with industry standards, regulations and internal requirements.

About Qualys

Qualys, Inc. (NASDAQ: QLYS) is a pioneer and leading provider of cloud-based security and compliance solutions. The Qualys Cloud Platform and its integrated apps help businesses simplify security operations and lower the cost of compliance by delivering critical security intelligence on demand and automating the full spectrum of auditing, compliance and protection for IT systems and web applications.

Founded in 1999, Qualys has established strategic partnerships with leading managed service providers and consulting organizations including Accenture, BT, Cognizant Technology Solutions, Deutsche Telekom, Fujitsu, HCL, HP Enterprise, IBM, Infosys, NTT, Optiv, SecureWorks, Tata Communications, Verizon and Wipro. The company is also a founding member of the Cloud Security Alliance (CSA). For more information, please visit www.qualys.com

Qualys Support

Qualys is committed to providing you with the most thorough support. Through online documentation, telephone help, and direct email support, Qualys ensures that your questions will be answered in the fastest time possible. We support you 7 days a week, 24 hours a day. Access support information at www.qualys.com/support/

Introduction to Qualys Security Assessment Questionnaire

Qualys Security Assessment Questionnaire (SAQ) give you the ability to create campaigns to help you send out questionnaires to any number of users and to collect their risk and compliance data.

Just create templates with your risk and compliance questions and requirements. Create a Campaign using this template, add users and launch the campaign. That's it! We will send out emails to the users and they can start responding to these questionnaires immediately.

Before you start

Only a user with Manager role can launch and manage Campaigns in SAQ. To create users with manager role you need to set up new users using Vulnerability Management (VM) and grant them access to the SAQ app.

How do I get started?

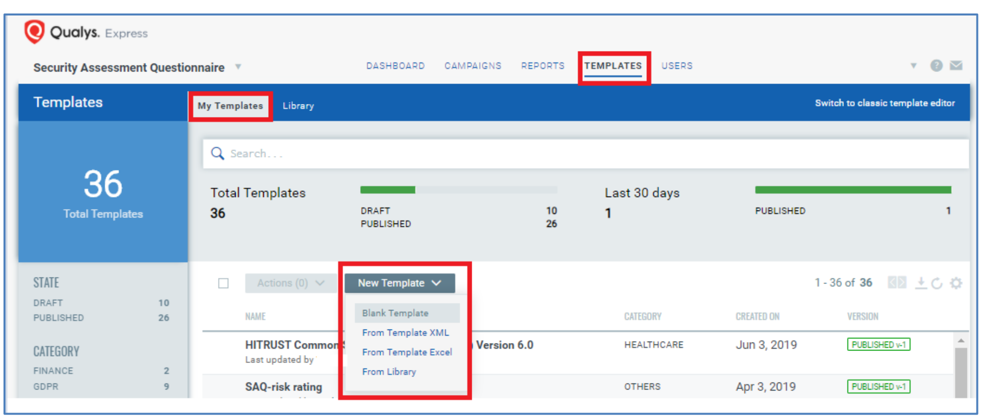
- Build a template
- Add users
- Create and launch campaigns

Build your templates

A template is where you formulate questions you want users to answer. While creating a template you can add rules, set criticality to the questions, assign risk scores to the template, etc. You can also create copies of a template and customize it for different purposes and audiences.

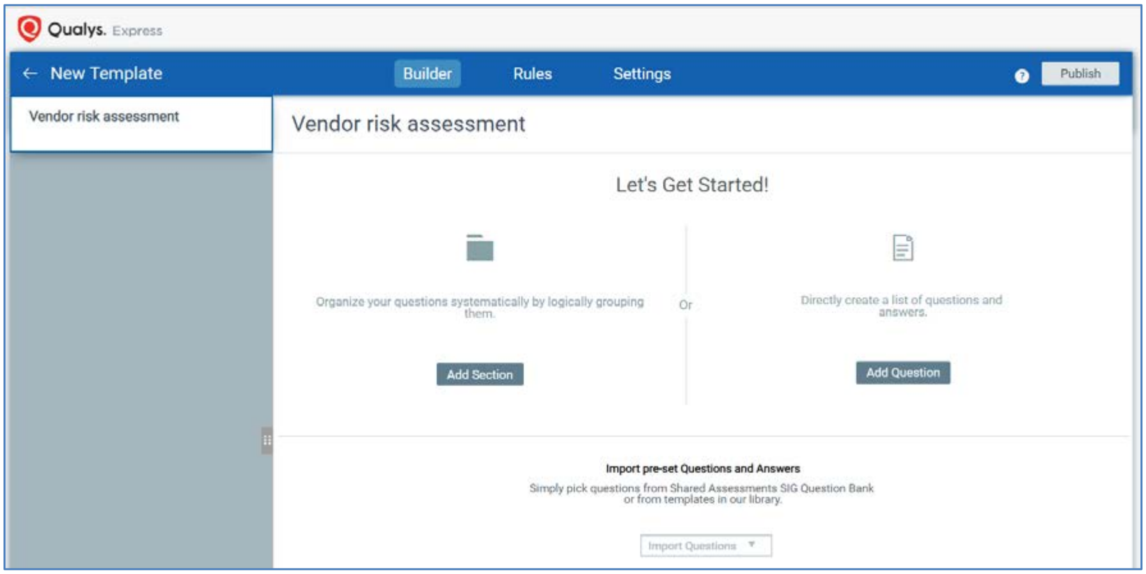
To create a template:

Go to Templates > My Templates and select New Template. You may select one of the four option. For example: select 'Blank Template'

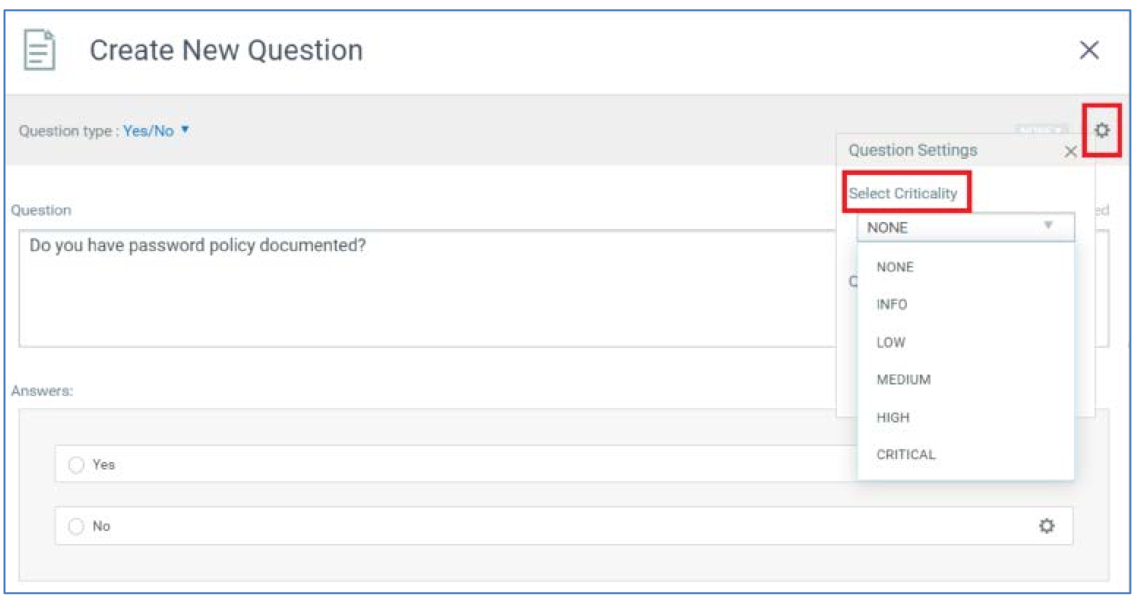


Provide a Template name and a description. Click ‘OK’. In the Builder tab of New Template editor, add questions, create rules, specify required attachments, layout, etc.

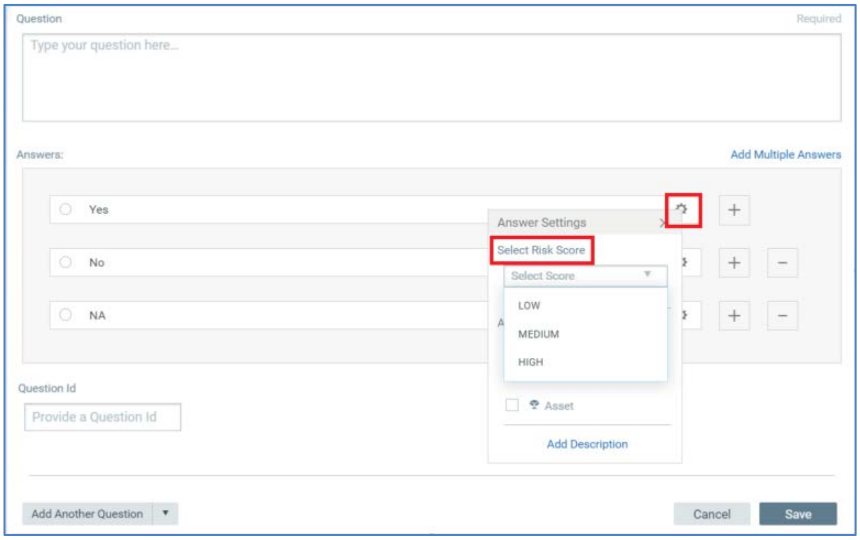
You can also simply pick questions from Shared Assessments SIG Question Bank or from templates in our Library to import in your template.



Set criticality for your questions



Set risk scores for each answer

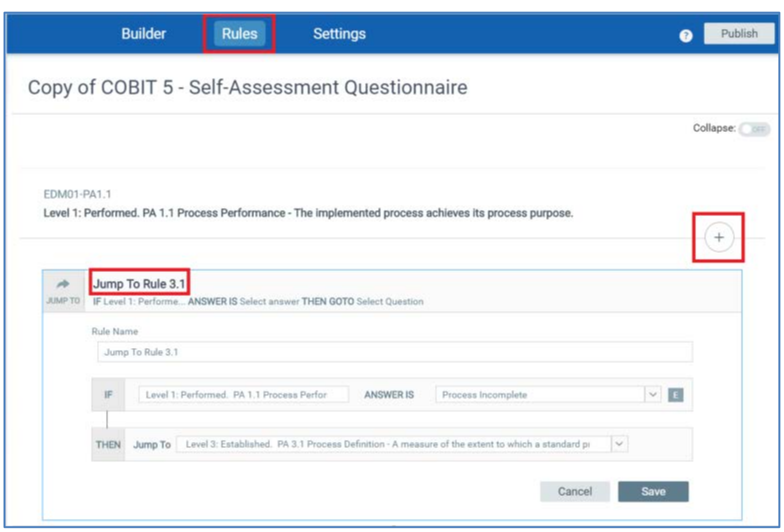


To make your questionnaire dynamic you can configure a template to create rules to show or hide questions in the template. These rules are executed dynamically in the questionnaire for that template, depending on the answers given by the responder

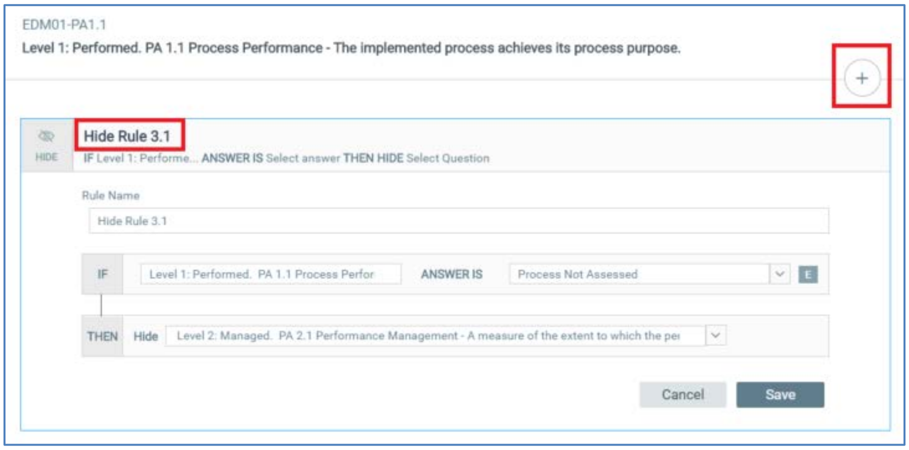
Manage Rules

To make your questionnaire dynamic you can configure a template to create rules to show or hide questions in the template. These rules are executed dynamically in the questionnaire for that template, depending on the answers given by the responder.

Jump Rule:

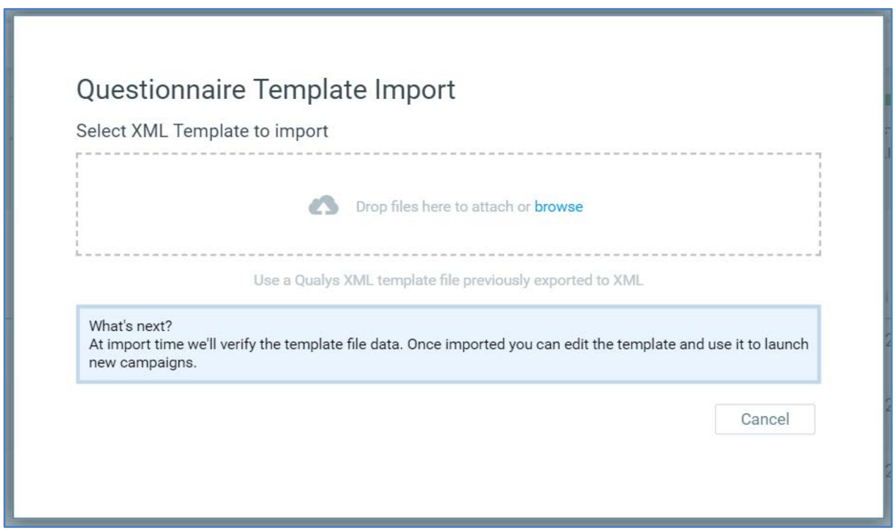


Hide Rule:

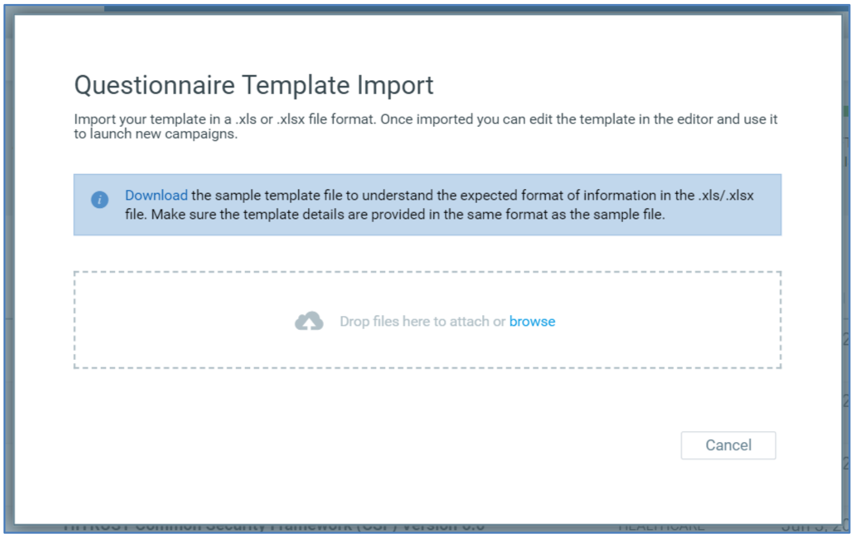


Once all questions are added click on 'Publish' to publish the template so that it can be used for campaign.

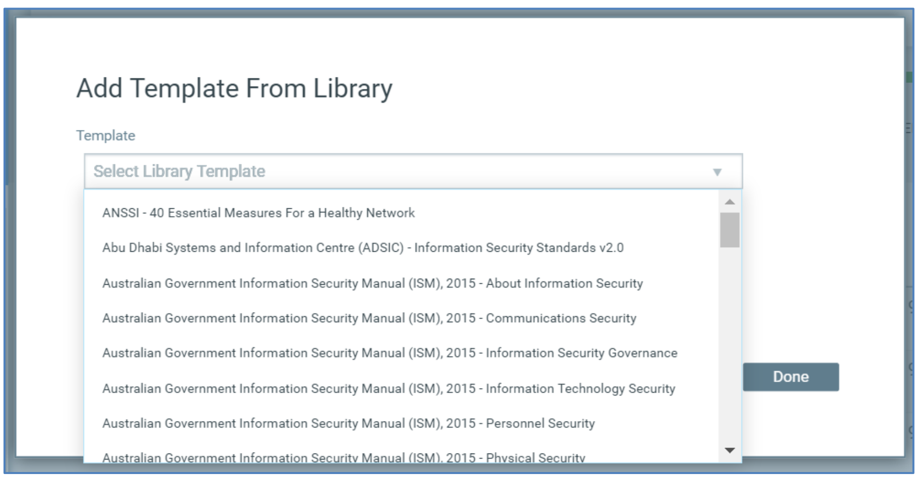
Other options of template creations are as mentioned below.
- From Template XML - Import a template as an XML file. Once imported you can use our template editor to make updates as you want.



- From Template EXCEL - Import template as an Excel (.xls or .xlsx) file. Once imported you can use our template editor to make updates as you want. Make sure you provide the template details in the same format in the sample template. You can download sample template from window witch will open once you select this option.



-From Library: You can directly import out of box templates from Qualys template library and edit it as per your requirement.



If you are creating a template from blank you can start by organizing your questionnaire in sections, subsections and questions. Or you can add sections to a template imported from XML or library.

Manage Users in Your Subscription

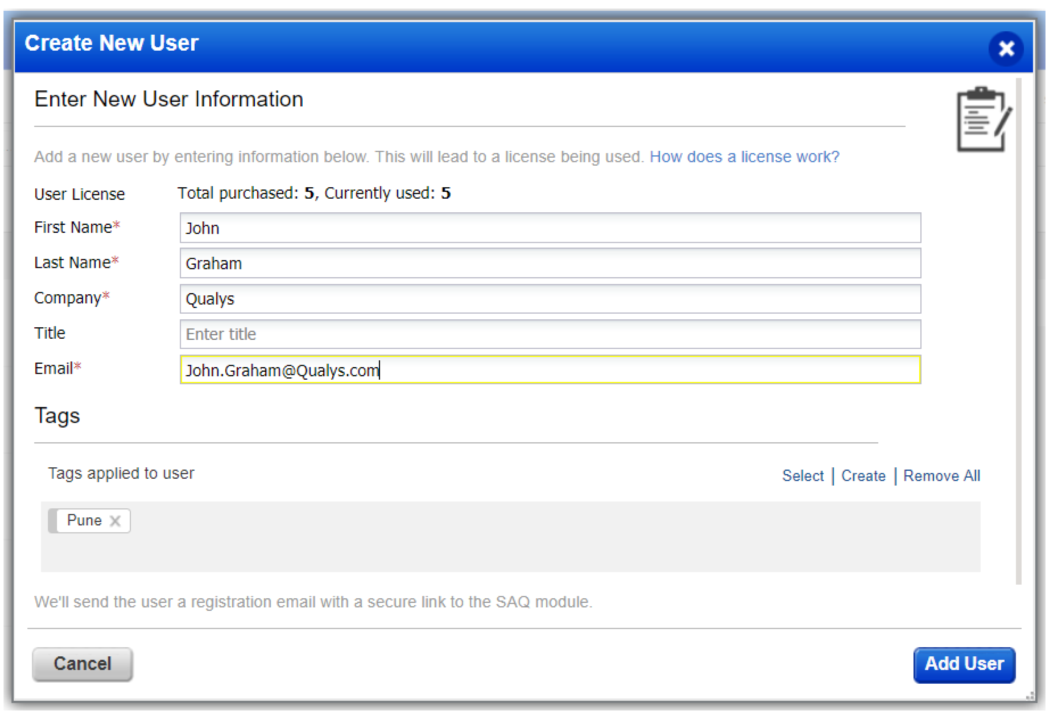
As a Campaign owner you can invite any number of people to your campaign, e.g. employees, partners, vendors or subject matter experts. These users can be in your subscription, outside of your subscription, from your organization, or external to your organization.

Creating a user with Manager role:
To create user with manager role you need to set up new users using VM module and grant them access to the SAQ app. Only a user with Manager role can launch and manage Campaigns in SAQ. Know more

To add a user

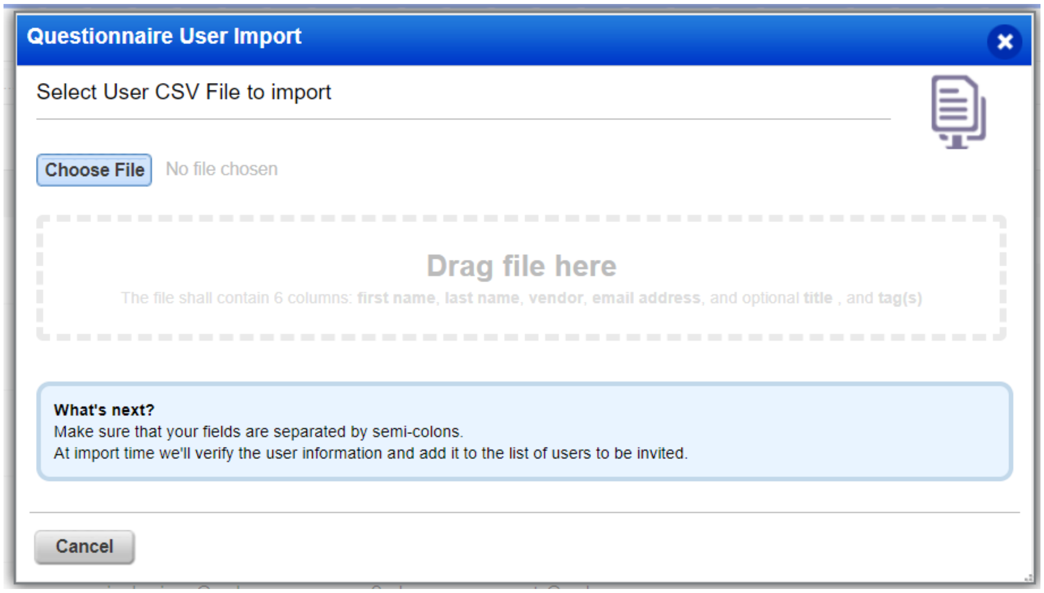
Go to SAQ > Users tab and click Add User

Provide all required information about the user and click Add User. This user is now added to your subscription and is listed in the Users tab.



Using CSV to add multiple users:

You can add multiple users by importing a CSV file. The file should contain the first name, last name, company and email addresses of the new users separated by semi-colons. Simply click Choose File or drag and drop the CSV file to import it.



Adding users outside of your subscription

You might want to send out questionnaires to users who do not already have access to the SAQ app. User same process of adding user to add this user. Once a user is assigned to an active campaign, the user will receive an email invitation to log in to the SAQ app and respond to their assigned questionnaire.

Deleting a user

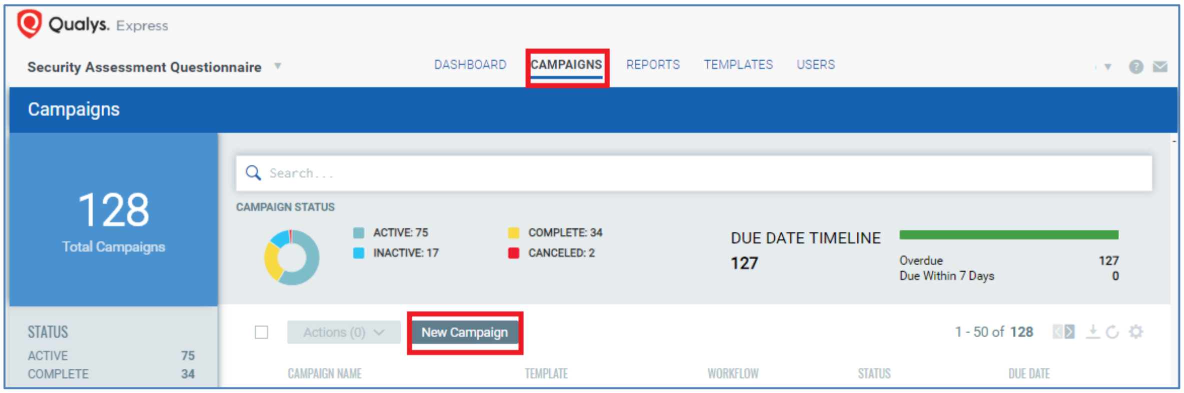
You can delete a user from SAQ if that user is not assigned to an active campaign. To delete user, navigate to the Users tab and choose Delete User from the Quick Actions menu. To delete multiple users in one go, select users in the list and choose Delete User from the Actions menu above the list.

Create & Launch Campaign

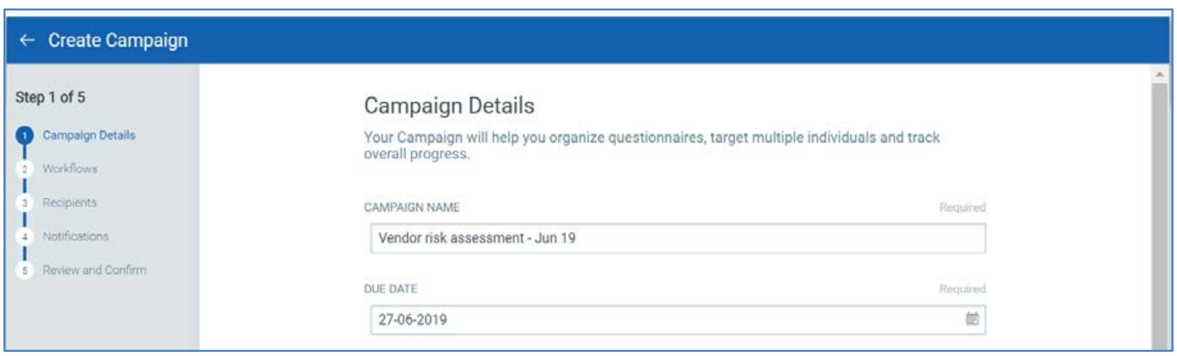
To collect the risk and compliance data you need simply create and launch campaigns to send out questionnaires to all the right people.

What you'll need

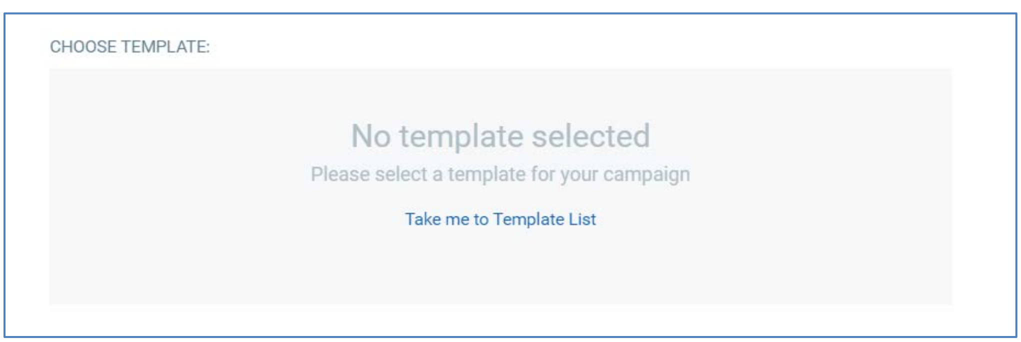
1) Go to Campaigns tab and select New Campaign.



2) Provide a name and due date for your campaign.



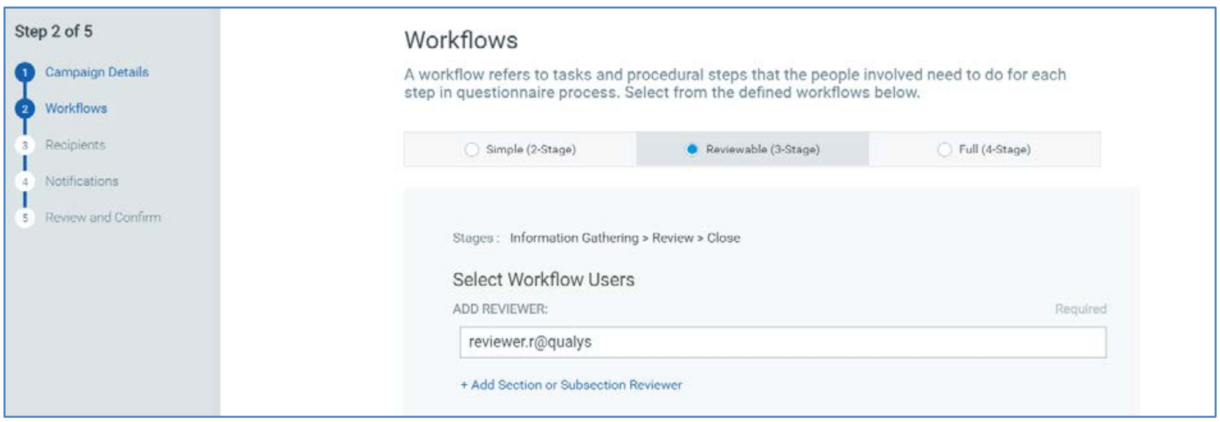
3) Choose template for campaign.



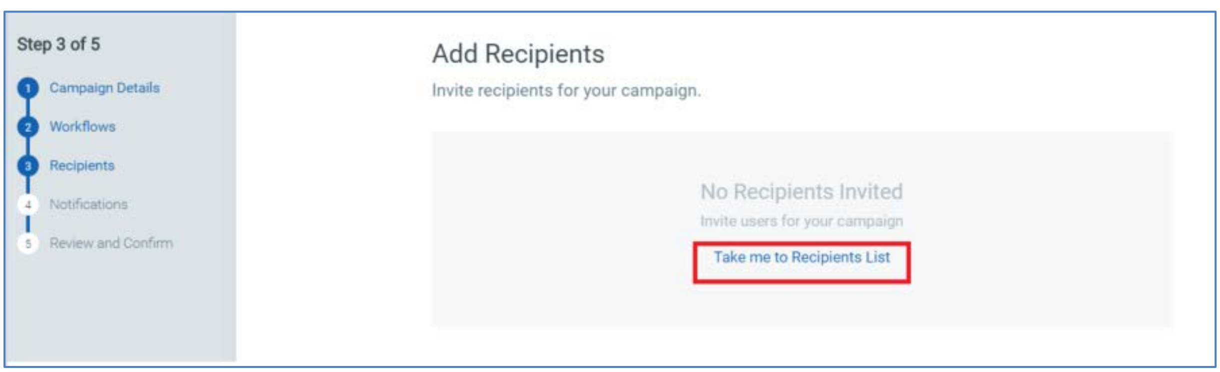
4) Choose a workflow as per requirement

Depending on the workflow you choose, the questionnaire answered by the responder is sent for review and approval.

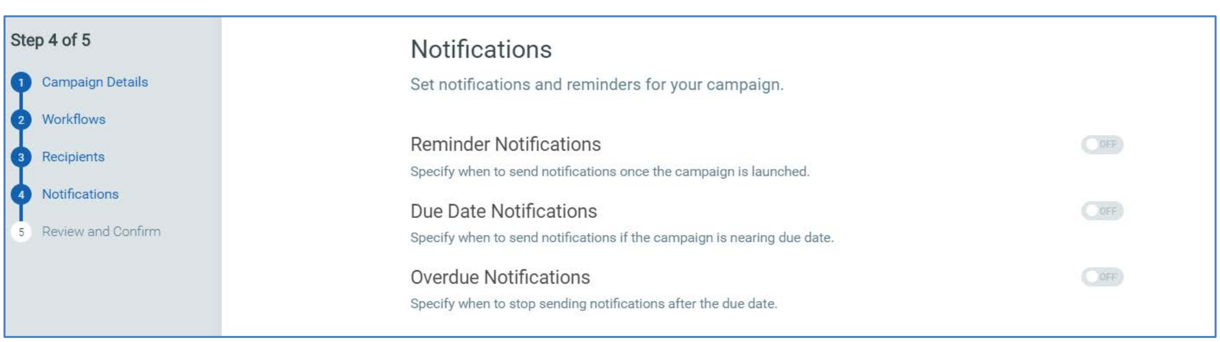
- Simple (2-stage) workflow send the questionnaire to user for information gathering.
- Reviewable (3-stage) workflow sends the answered questionnaire to a reviewer for review. You can also add separate reviewers per section or subsection.
- Full (4-stage) workflow sends the answered questionnaire to a reviewer and an approver.



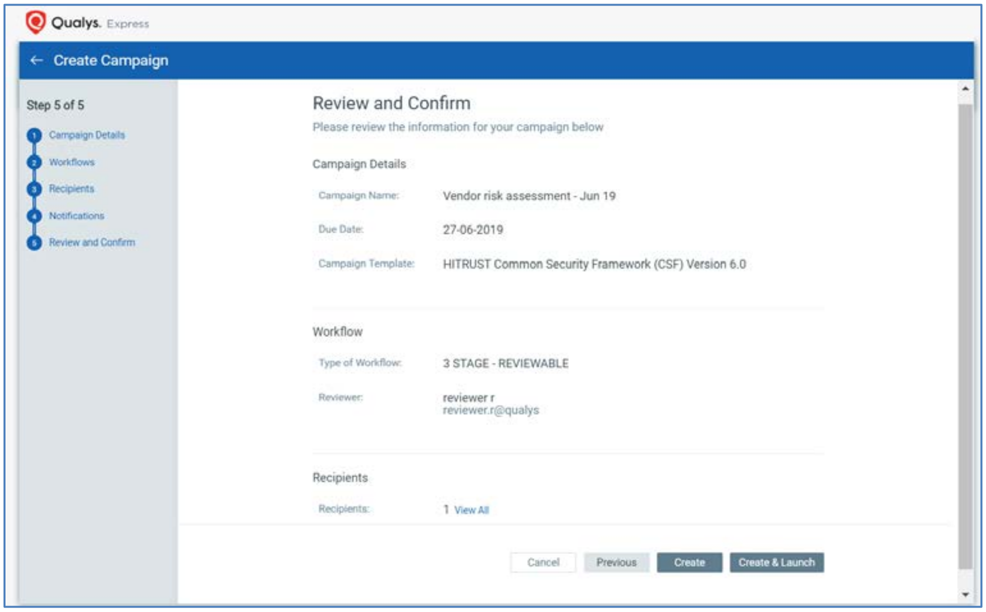
5) Add users that you want to send the questionnaire to



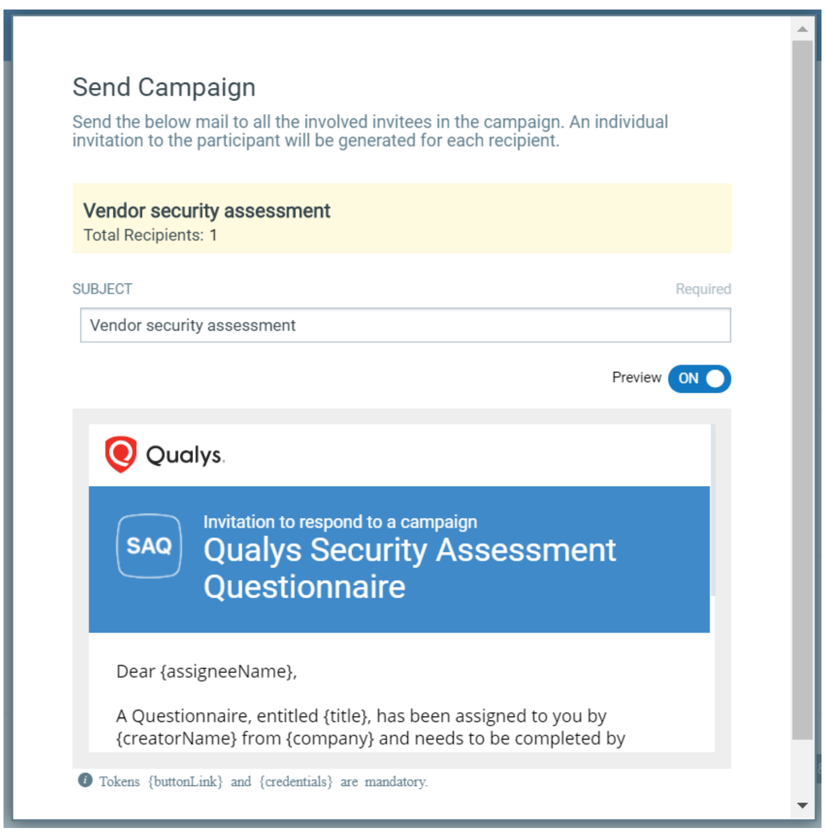
6) Set notifications and reminders for your campaign



7) Review campaign summary page and click on 'Create & Launch'



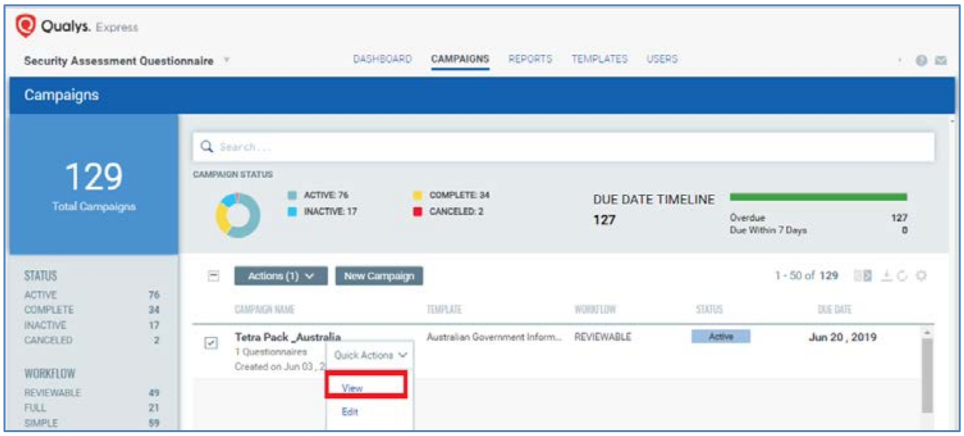
8) Review your campaign notification. You can click on 'preview' button to customize the notification.



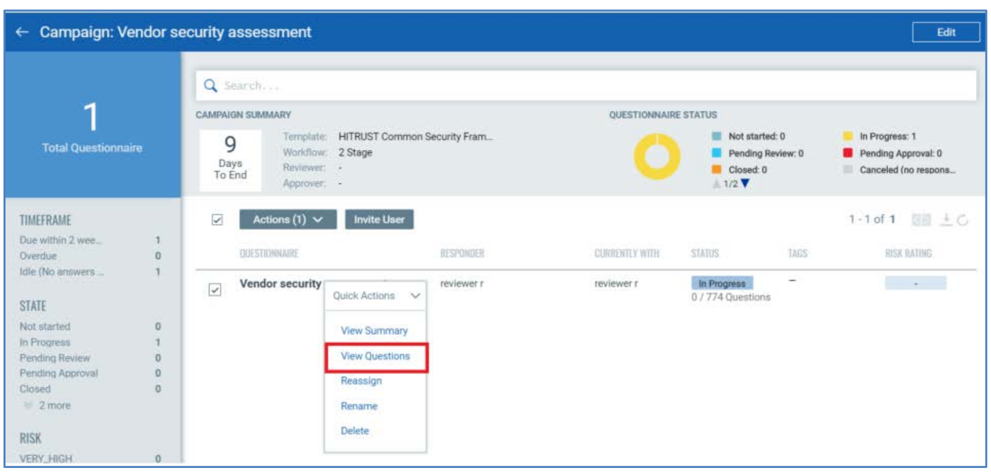
Monitor responses

You can monitor responses to your campaigns in real time.

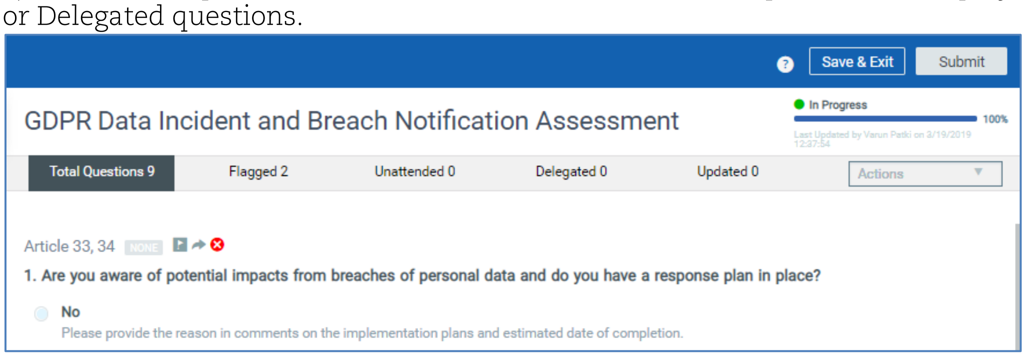
1) Go to Campaigns tab and double click on the campaign name for which you want to check the status



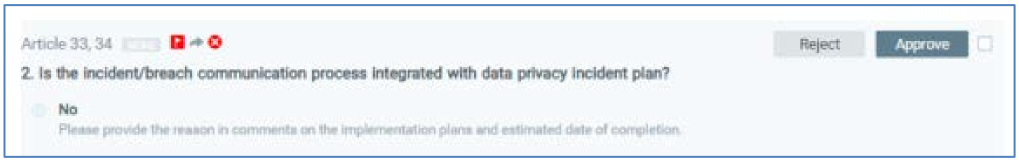
2) Select a questionnaire, open the Quick Actions menu and choose options to view question, summary etc. Click View questions



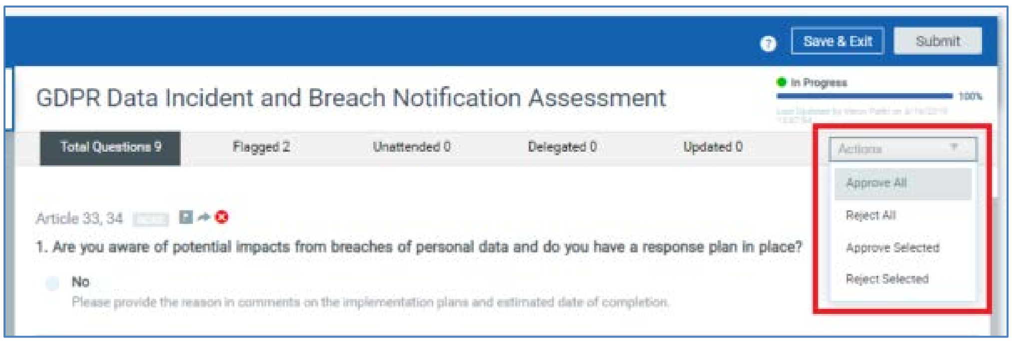
3) To filter the questions, click the filter buttons above the questions to display All, Incomplete or Delegated questions.



4) Approve or reject individual answer or all answers at once



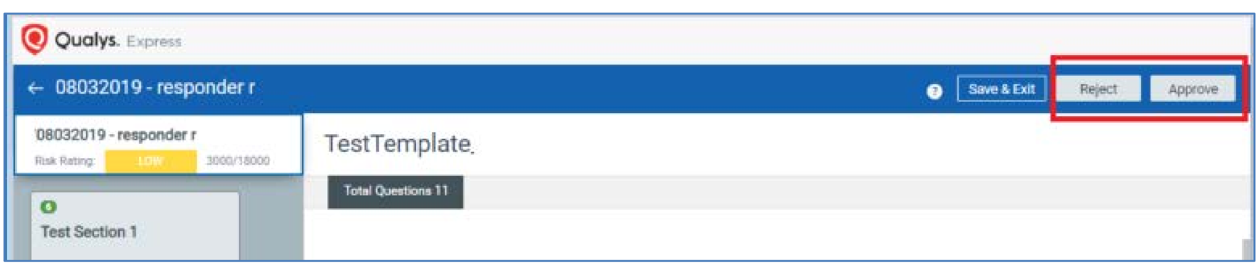
Or



If the questionnaire's workflow includes a review stage, it is not complete until all questions are reviewed by reviewer or a delegated user. As you click each question, you'll see Approve and Reject buttons in the question palette. Once you have marked all questions as either approved or rejected, you can submit the questionnaire.

If you've rejected one or more answers the questionnaire will be returned to the responding user. This user will have to correct the rejected answers and resubmit the questionnaire. If you've approved all questions, the questionnaire goes into its next state according to its workflow - either closed or approval.

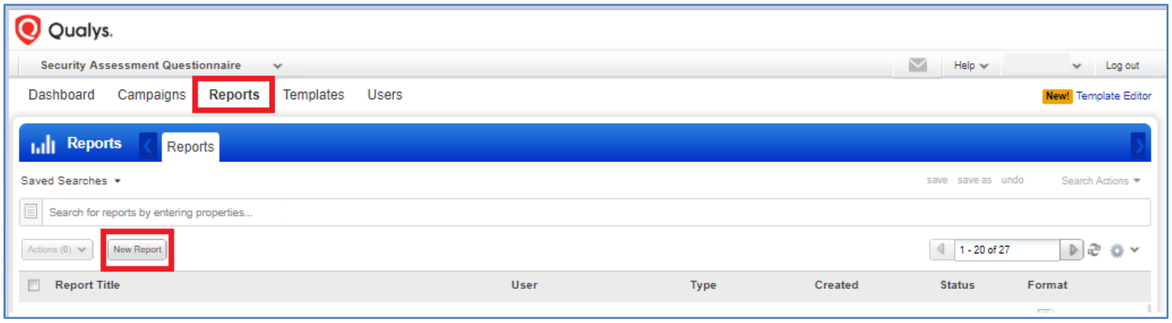
5) If the workflow includes an approval stage the questionnaire remains active and needs to be approved to be closed. Choose View Questions from the quick action menu, click right side of the Approve button (arrow) and choose either Approve or Reject.



Create Reports to get current views on responses

You can launch reports anytime to get the latest responses submitted by users. You can preview and edit the report results before you generate the final report.

Just go to Reports > New Report, choose your report and we'll walk you through the steps.



Single Instance Report

This is report on one instance of a questionnaire. An instance is specific to one assigned user. For example, if you launched a campaign and invited 6 users, you'll choose 1 of 6 instances for your report. (You need to be campaign/questionnaire owner to create this report)

Aggregate Template Report

Report on multiple questionnaires launched from one template. You'll choose a template and, optionally, apply filters. If no filters are applied all questionnaires launched using the template are included. (You need to be campaign/questionnaire owner to create this report)

Campaign Report

Report on a single campaign. (You need to be campaign owner to create this report)