AutoQ
AI QUESTIONNAIRES

DATA CENTER AUDIT · CONTROL QUESTIONNAIRE

Data Center Security Review

User Manual · Version 3.1

How to plan the review, answer the 111 control questions, turn the answers into findings, track progress and produce the reports, in both the hosted and the standalone versions.

Version 3.1
October 2026

For auditors and audit leads
Your own server and Hosted AutoQ

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CHAPTER 1

About the review

The Data Center Security Review is a shared workspace for testing the controls that protect a data center, recording what you find, and producing the audit findings.

1.1 What it's for

The review assesses whether the controls that protect the data center, the systems it hosts and the data they hold are designed well and operating as intended. Each control is a statement such as "Data center entry requires a badge plus a second factor". You test it, record whether it holds, and add a comment describing what you examined.

From those answers the review produces, automatically:

- **Statements of fact** ready for the audit report: a positive statement for each control in place, and a negative statement for each control that is not.
- **Risks and recommendations** for every exception, ordered from highest risk to lowest.
- **Progress tracking** by category, so the audit lead can see what remains.

1.2 What it covers

The questionnaire contains **111 controls in five categories**. Every control has a suggested test procedure, the evidence to request, a risk weight from 1 (low) to 3 (high), and references to three frameworks: NIST SP 800-53 Rev 5, ISO/IEC 27001:2022 Annex A and COBIT 2019.

CATEGORY	CODE	CONTROLS	HIGH RISK	MAIN FOCUS AREAS
Physical Security	PH	22	5	Access control, environmental protection, asset protection, monitoring
Data Security	DS	27	10	Encryption, network security, privileged access, access provisioning
Backup	BK	19	7	Backup operations, governance, storage, access
Recovery	RC	20	6	Disaster recovery planning, infrastructure, testing, procedures
Change Management	CM	23	5	Approval, configuration, governance, segregation of duties
All categories		**111**	**33**	

Each control has an ID made of the category code and a number, for example `PH-05` or `DS-14`. The IDs are used throughout the review, in the workbook and in exports.

1.3 Where the review runs

The review looks and works the same way wherever it runs. Your audit lead will tell you which your team uses.

	YOUR OWN SERVER	HOSTED AUTOQ
Edition	**AutoQ Version 3.1**, Standalone or Enterprise	Run for your organization on the AutoQ servers
Where it runs	On a Windows computer at your organization, opened at `http://localhost:3000/` or the computer's network name. One computer can run several reviews, for example one per data center.	On the AutoQ servers, opened from the project's link, such as `https://autoq-ai.com/a/k7m2q9/r/dc-2027/` (section 2.7)
Signing in	Your name plus a sign-on password: the shared one, or the review's own if it has one	Your name plus the project's own sign-on password
Where answers are kept	In the review's Excel workbook, on the Questionnaire sheet	
Evidence files	Uploaded on each control and kept with the review (section 5.9)	
Who sees the Admin tab	Everyone signed in to the review, but it stays locked until an administrator (project lead) password is entered	
What the Admin tab offers	Data center details, the team, project reports, backups, the project archive, content packs, passwords, Clear All and the manuals	The same, except content packs and the server's own settings: one project's two passwords only

1.4 Roles

ROLE	WHAT THEY DO IN THE REVIEW
Auditor	Tests controls, records answers and comments on the Plan tab, and checks their findings.

ROLE	WHAT THEY DO IN THE REVIEW
Audit lead	Assigns categories, tracks progress on the Project tab, reviews Findings, produces the reports (chapter 8), and uses the Admin tab to keep the data center details, backups and passwords (chapters 7 and 11).
Reviewer	Reads Findings and the reports.

CHAPTER 2

Getting started

This chapter covers starting the review on your own server, signing in and out, and opening a project in Hosted AutoQ.

2.1 Requirements

- **Any recent browser:** Microsoft Edge, Google Chrome, Firefox or Safari, on a computer, tablet or phone.
- **Your own server, on the computer that runs it:** Windows 10 or 11. The installer, `AutoQ-Standalone-Setup` or `AutoQ-Enterprise-Setup`, sets everything up, including Node.js. Your audit lead or IT team usually does this (see the Administrator Manual).
- **Hosted AutoQ:** nothing to install: just the project's link and its sign-on password.

2.2 Starting the review (standalone)

1. Open the Windows **Start** menu and select **Auto-Q**, then **AutoQ**. (Or double-click **`start.cmd`** in the installation folder, normally `C:\Program Files\Auto-Q`.)
2. A black command window opens. It lists the reviews on this computer, with the number of controls and answers in each, and the address to open.
3. A small window says **Server is starting... Please wait.** When the server is ready, it closes and your browser opens `http://localhost:3000/` automatically. If it doesn't, open that address yourself, or refresh the browser. If the review is already running, the browser simply opens it.
4. Keep the command window open while anyone is using the review. Closing it stops every review on the computer for everyone.

> **NOTE**
> If your audit lead runs the review on a shared computer, you don't start anything yourself. Open the address they give you, for example `http://audit-pc:3000/`.

2.3 Signing in

The review opens on a sign-in page. Nothing in the review, including the answers, can be seen until you sign in. The page shows the review's name, or **AutoQ Reviews** when the computer runs several reviews.

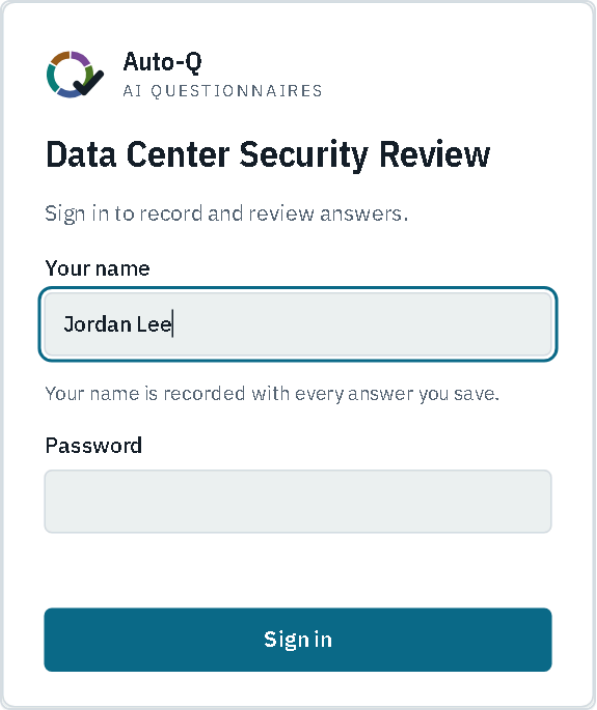


Figure 2.1 The sign-in page.

1. Type **your name** as you want it to appear on your answers, for example "Jordan Lee". Any name is accepted, and the browser remembers it for next time.
2. Type the **sign-on password** your audit lead gave you.
3. Select **Sign in** or press `Enter`. The review opens on the Introduction tab. If the computer runs several reviews, you see the list of reviews your password opens instead (section 2.4).

> **YOUR NAME SIGNS YOUR ANSWERS**
> Every answer you save is recorded with the name you signed in with, in the workbook's *Answered By* column. Use your real name so the audit trail is meaningful. Sessions last 12 hours.

2.4 Reviews and their passwords

Version 3.1 can run several reviews on one computer, for example one for each data center or for each client. Each review has its own workbook and answers, and can have its own passwords. Until it is given its own, a review uses the **shared** sign-on password.

When the computer runs more than one review, signing in shows the **list of reviews** your password opens:

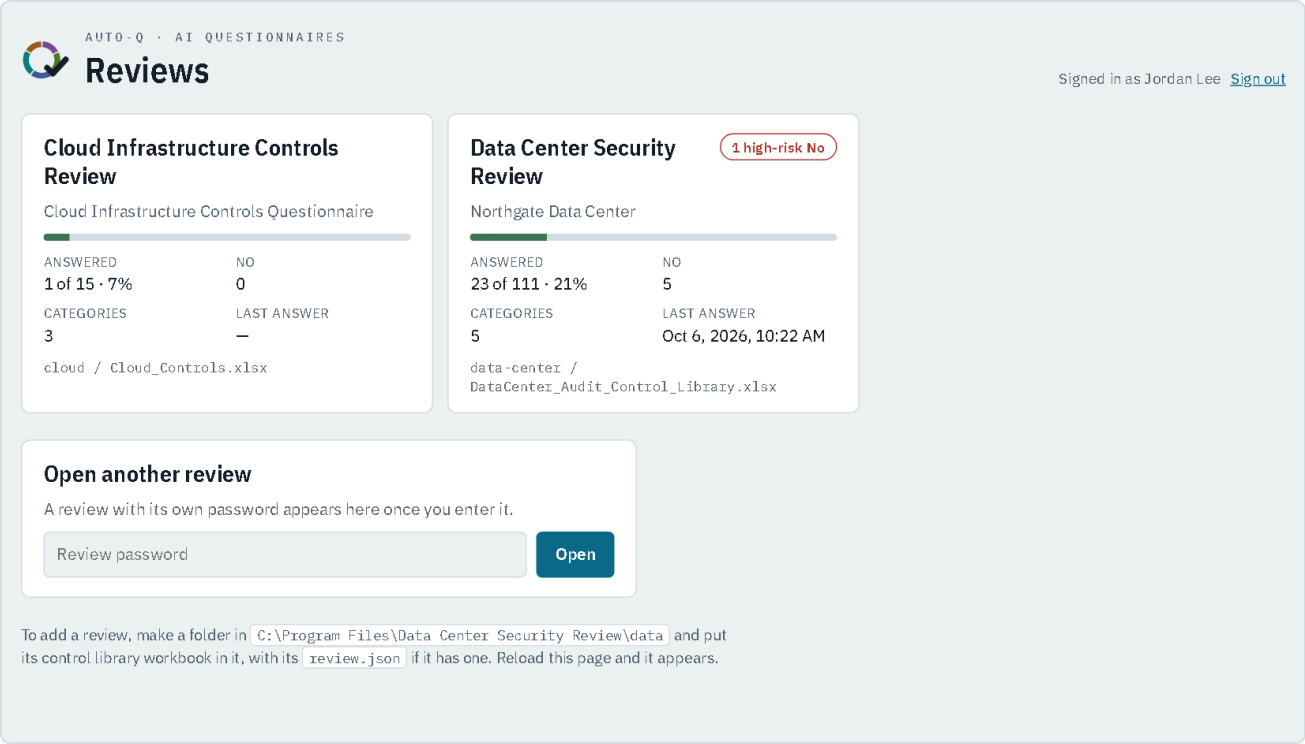


Figure 2.2 The list of reviews. Each card shows the review's progress, its No answers, high-risk No answers and the last answer. Select a card to open the review.

- **You see only the reviews your password opens.** A review with its own password doesn't appear until you enter that password under **Open another review**. It's then added to the list, and you stay signed in to the others.
- **Opening a link to a review you can't open yet** shows a password box for it, with your name already filled in. Enter the review's password to open it.
- **All reviews**, at the top right of a review next to your name, returns to the list. It appears only when the computer runs more than one review.

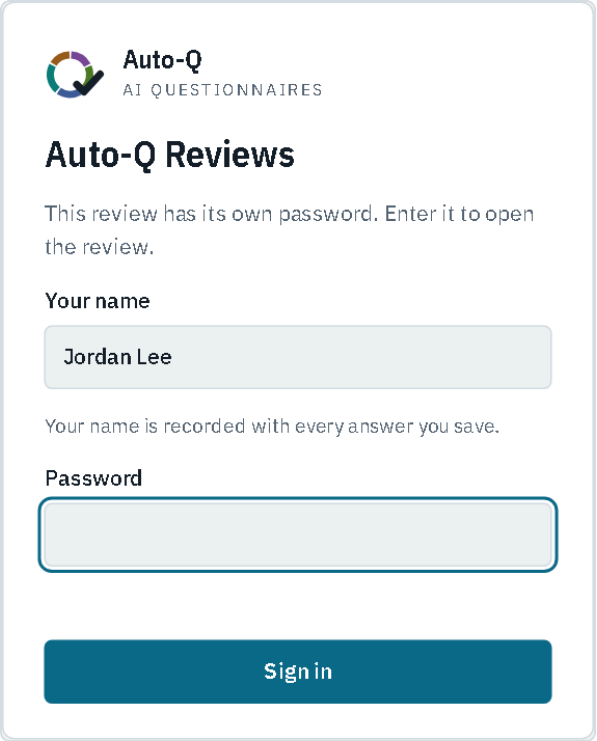


Figure 2.3 Opening a review that has its own password.

> **KEEPING REVIEWS APART**
> Someone who doesn't have a review's password can't see its name, its progress, or even whether it exists. Keep each review's password to the people working on it.

2.5 Failed sign-ins and the security violation

If the password is wrong, the page says so and shows how many attempts remain. A password that doesn't open the review you asked for counts as wrong too.

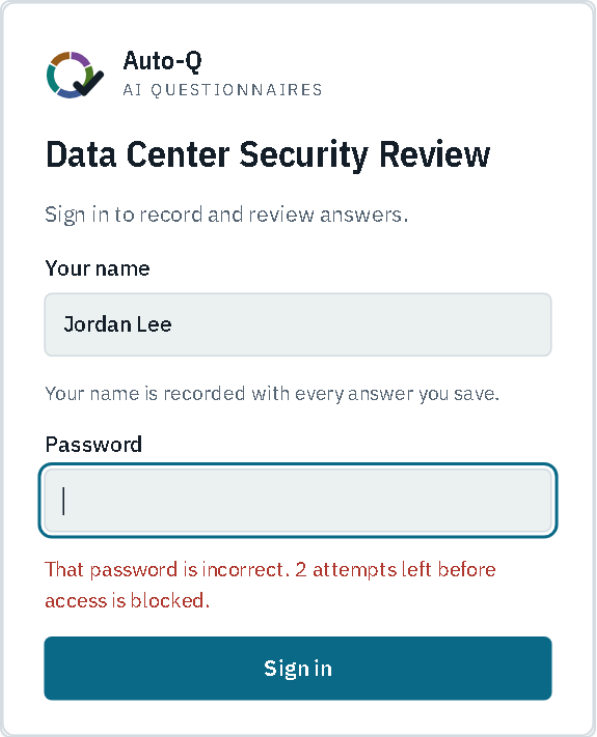


Figure 2.4 A wrong password, with two attempts left.

After **three wrong passwords in a row** from the same computer, the page shows a **Security violation**:

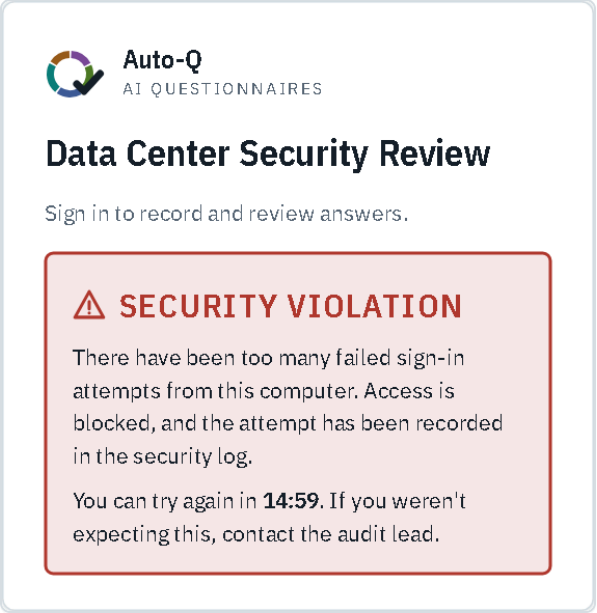


Figure 2.5 The security violation panel. The countdown shows when you can try again.

- The computer is blocked for **15 minutes**, for every review. During that time even the correct password is refused.
- Every failed attempt, the violation and any attempt during the block are recorded in the security log with the time, the computer's address and the name typed.

- When the countdown ends the sign-in page returns. If you weren't expecting a violation, tell your audit lead.

2.6 Signing out and stopping

- **Sign out:** select **Sign out** at the top right of any page, next to "Signed in as ...". It signs you out of every review. Do this on a shared computer, or to switch to a different person.
- **Stop the review (standalone):** in the command window, press `Ctrl` + `C`, or close the window. Everything already saved is in the workbook. Restarting the server signs everyone out.

2.7 Projects in Hosted AutoQ

When your organization has a hosted AutoQ account, each review is a **project** on AutoQ's server, with a link such as `https://…/a/k7m2q9/r/dc-2027/`. It works like any other review in this manual, with these differences:

- **Signing in:** open the project's link and sign in with your name and the project's **sign-on password**. The password opens that project only. Your organization's account administrator sets it, and the project lead can change it on the Admin tab.
- **Admin tab:** the project lead unlocks it with the **project lead password**, also set by the account administrator. There are no shared passwords, so *Passwords* changes only this project's two passwords. *Manuals and guides* lists this User Manual and the User Quick Start.
- **Read-only projects:** if the project's free trial or subscription has ended, a banner across the top says so. You can still sign in, read everything, export and download the project, but answers, evidence and settings can't be changed until the account administrator buys or renews it. A project left read-only is deleted after 90 days.

CHAPTER 3

Finding your way around

Every page shares the same header and menu.

3.1 The header and menu

Figure 3.1 The header. Under the title is the data center's name and address. The thin bar shows overall progress: green for Confirmed, red for No, grey for N/A. Hover over it for the counts.

ITEM	WHAT IT DOES
Data center	The name and first line of the address of the data center under review, once they are entered on the Admin tab (section 7.3).
Progress bar	Shows how much of the questionnaire is answered and how. Hover to see the exact counts.
All reviews	Standalone edition, when the computer runs more than one review. Returns to the list of reviews (section 2.4).
Signed in as ... · Sign out	Standalone edition only. Shows your name and signs you out of every review.
Dark mode / Light mode	Next to Sign out. Switches the colors of every page in this browser; select it again to switch back. Printing and PDFs always use light colors.
Menu tabs	Introduction, Plan, Findings, Project and Admin. The badge on Findings counts the facts (Confirmed and No answers); the badge on Project shows the percentage complete. The padlock on Admin is a reminder that it needs the administrator password.
Export CSV	Downloads every control with its answer and finding text as a spreadsheet file (section 8.2).
PDF	Saves the tab you are on as a PDF document (section 8.1).
Word	Saves the tab you are on as a Word document you can edit (section 8.1). The export buttons are hidden on the Admin tab.

3.2 The five tabs

TAB	USE IT TO	CHAPTER
Introduction	Read the executive overview of the questionnaire and the instructions to users. The review always opens here.	4
Plan	Work through the controls: test, answer and comment.	5
Findings	Read the statements of fact, the exceptions with their risks, and the recommendations.	6
Project	Track progress by category.	7.1
Admin	For the audit lead: the data center details, workbook backups, passwords, and clearing all answers to start a new review. Locked by the administrator password.	7.2–7.6

3.3 Direct links

Each review has its own address, ending in `/r/` and the review's short name, for example `http://localhost:3000/r/data-center/`. Add an anchor to it to open a particular tab or control. This is useful in emails and meeting notes.

ADDRESS ENDS WITH	OPENS
`#introduction`	The Introduction tab (also what opens with no anchor)
`#plan`	The Plan tab
`#facts`	The Findings tab
`#project`	The Project tab
`#admin`	The Admin tab (it still asks for the administrator password)
`#PH-05` (any control ID)	That control, open in the Plan tab

For example, `http://audit-pc:3000/r/data-center/#PH-05`. Someone who isn't signed in sees the sign-in page first, then the link opens.

3.4 Phones, themes and accessibility

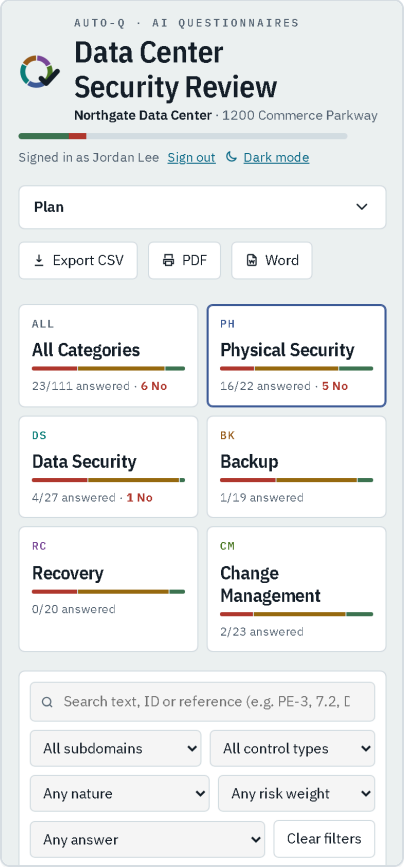


Figure 3.2 The Plan tab on a phone.

- **Phones and tablets:** the layout adjusts to narrow screens. On a phone, opening a control fills the screen; use **Back** to return to the list.
- **Light and dark:** the review follows your device's light or dark setting until you choose one with **Dark mode** or **Light mode** in the header, next to Sign out. Your choice applies to every tab, the sign-in page and the list of reviews, and is remembered in that browser.
- **High contrast:** with Windows high contrast turned on, the chart bars, answer labels and chosen answer keep their colours so they stay readable.
- **Keyboard:** every control can be reached with `Tab`. Shortcuts are listed in section 5.4.

CHAPTER 4

The Introduction tab

The review always opens on the Introduction, an executive overview of the questionnaire that's suitable for sharing with management.

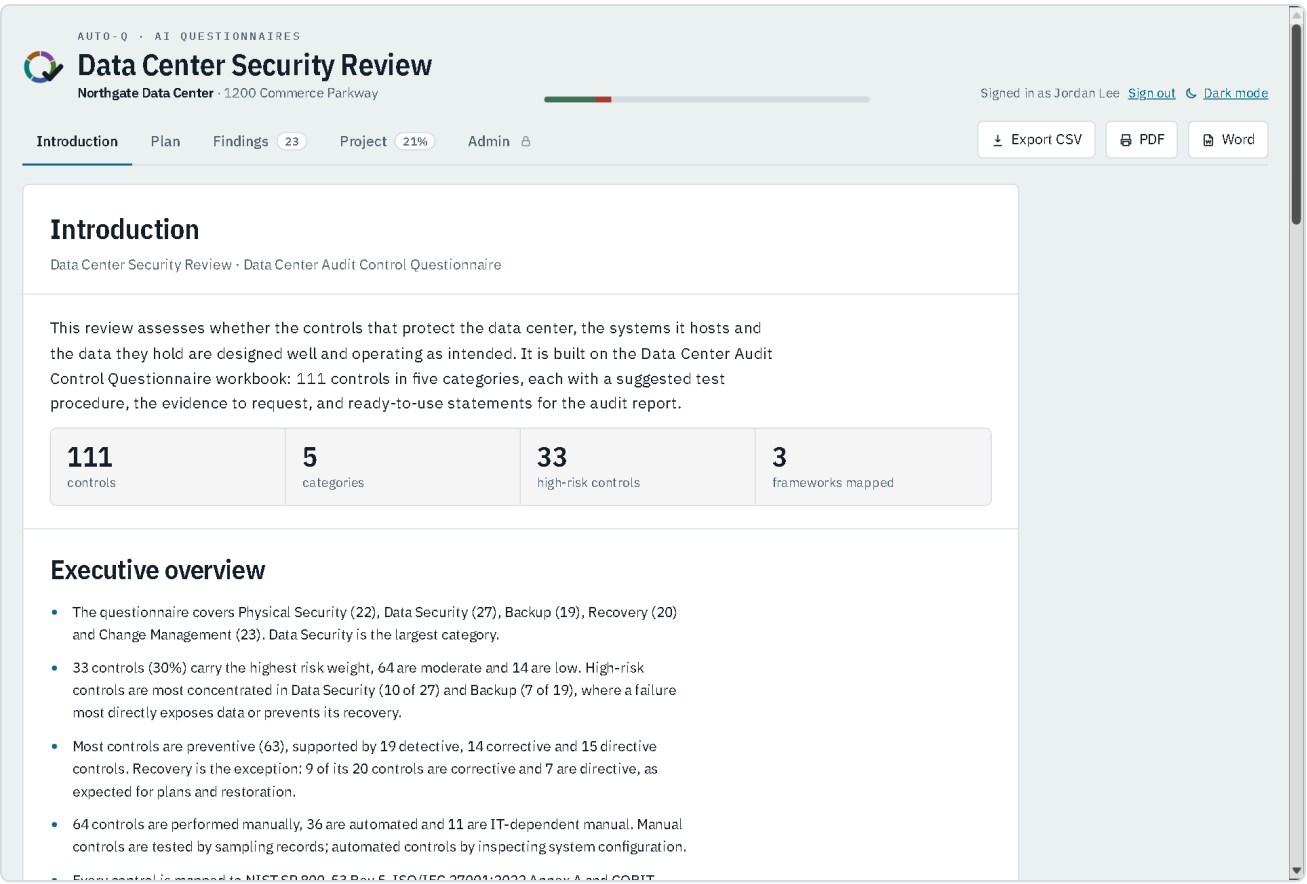


Figure 4.1 The top of the Introduction tab.

From top to bottom it contains:

- **Key figures:** 111 controls, five categories, 33 high-risk controls and three frameworks mapped.
- **Executive overview:** the size of each category, how risk is spread, the mix of control types, how controls are performed, and the framework mapping.
- **Controls by category:** a table of risk levels and main focus areas.
- **Where the highest risks sit:** the high-risk themes in each category.
- **How the review works**, the **rating approach** and the **source workbook**.
- **Instructions to users**, with the workflow below.

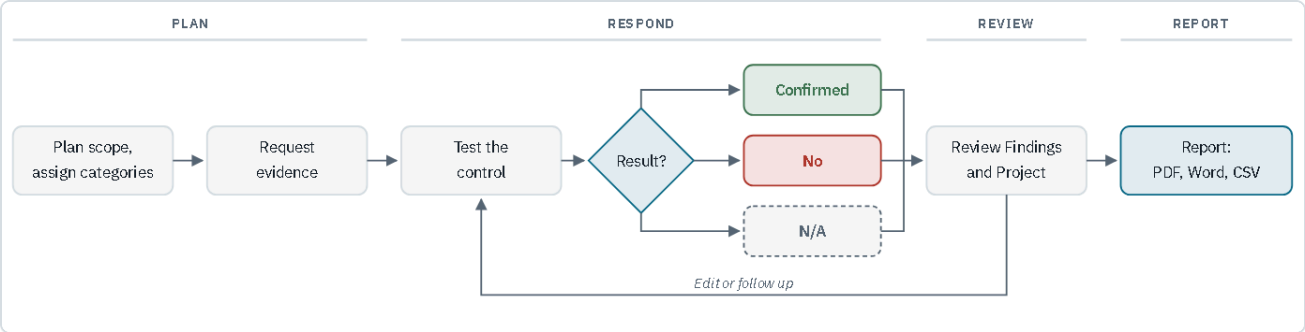


Figure 4.2 The review workflow from the Instructions to users. Review loops back to testing whenever a finding needs correcting or follow-up.

The figures on this page are worked out from the controls themselves, so they stay accurate if the controls in the workbook change. Use the **PDF** or **Word** button on this tab to give management a short overview document.

CHAPTER 5

The Plan tab: answering the questionnaire

The Plan tab is where the testing work is recorded. It lists the controls on the left and shows the one you open on the right.

5.1 Layout

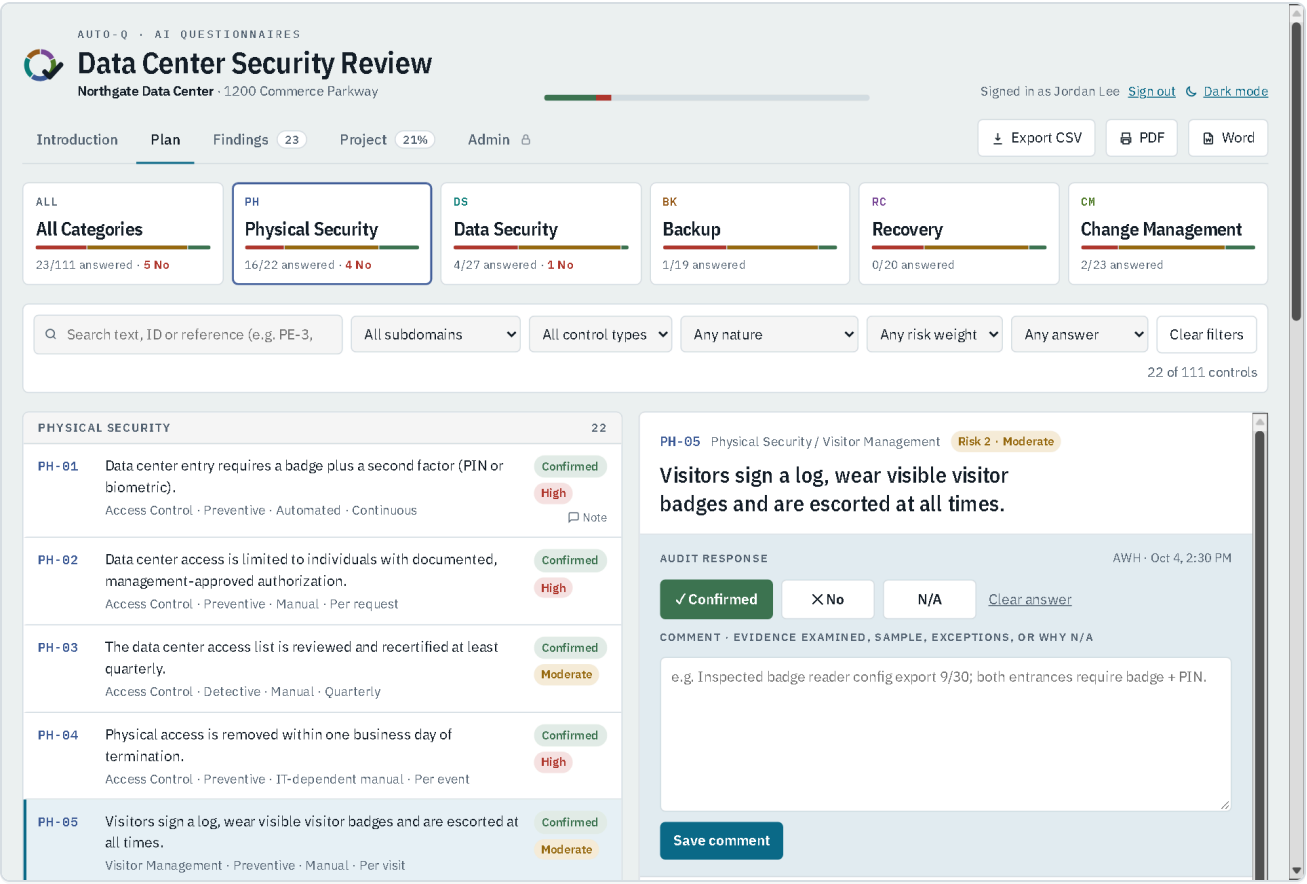


Figure 5.1 The Plan tab, filtered to Physical Security, with PH-05 open.

1. **Category buttons** across the top.
2. **Search and filters** below them.
3. **The control list** on the left, grouped by category.
4. **The control panel** on the right, where you answer.

5.2 Categories, filters and search

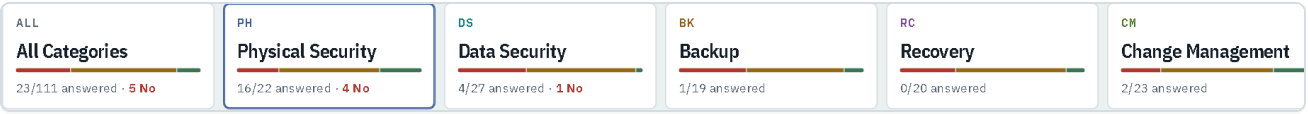


Figure 5.2 Category buttons. The coloured line shows the mix of high (red), moderate (amber) and low (green) risk controls; the text below counts answered controls and No answers.

Select a category button to show only that category. Select **All Categories** to show every control.

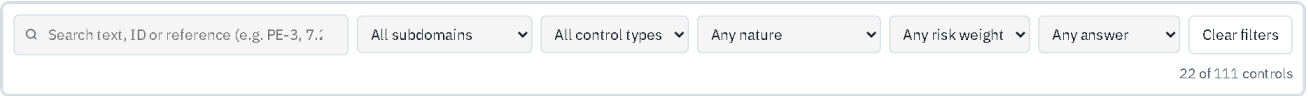


Figure 5.3 Search and filters.

FILTER	SHOWS
Search	Controls containing all the words you type, searching the control text, test procedure, evidence, findings, comments and framework references. Try `PE-3`, `8.13` or `DSS05` to find controls by reference.
Subdomain	A grouping within the category, such as Access Control or Encryption.
Control type	Directive, Preventive, Detective or Corrective.
Nature	Manual, Automated or IT-dependent manual.
Risk weight	3 High, 2 Moderate or 1 Low.
Answer	Not answered, Answered Yes, Answered No, Answered N/A, or Has a comment.

> **TIP**
> Selecting the **Plan** tab always sets the Answer filter to **Not answered**, so the list shows the work still to do. Choose "Any answer" or select **Clear filters** to see everything. Your filters are remembered in your browser between visits.

5.3 Reading the list

Each row shows the control ID, its text, its subdomain, type, nature and frequency, and labels on the right:

LABEL	MEANING
Answer	Not answered yet. The text reads as an action, "Determine if ...".
Confirmed	The control is in place.

LABEL	MEANING
No	The control is not in place: an exception.
N/A	The control doesn't apply to this data center.
High Moderate Low	The control's risk weight.
Note	The control has a saved comment.

5.4 The control panel

Select a control in the list to open it. Unanswered controls are phrased as an action, for example "Determine if visitors sign a log ...". Once answered, the original statement is shown.

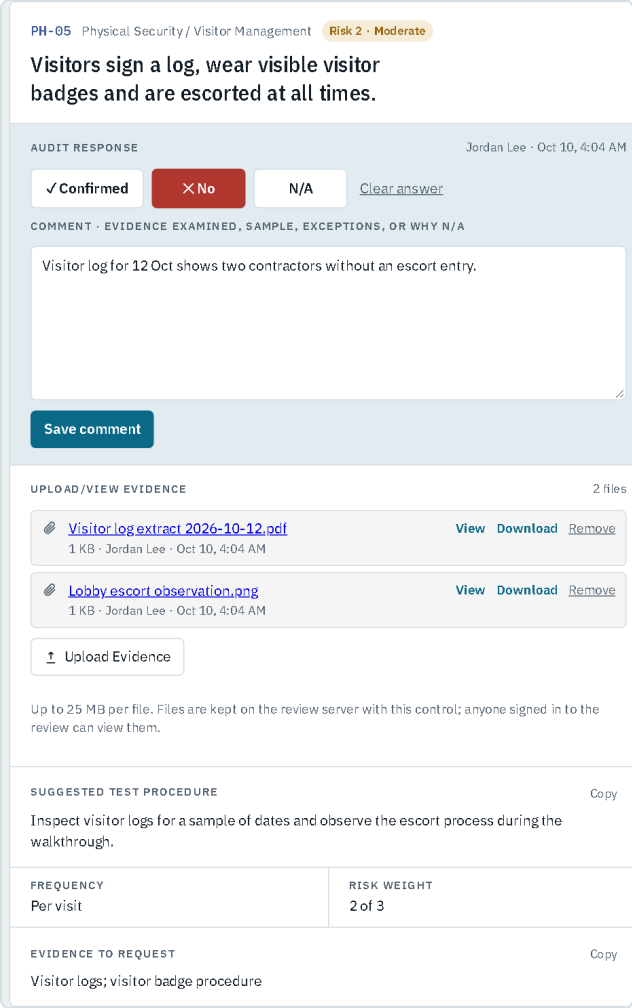


Figure 5.4 The control panel for PH-05, answered No with a comment.

From top to bottom

- **Heading:** ID, category and subdomain, risk, and the control statement.
- **Audit response:** the answer buttons, comment box and Save comment. The top right shows who last answered and when.
- **Suggested test procedure:** how to test the control.
- **Frequency** and **risk weight**.
- **Evidence to request** from the auditee.

The **Copy** buttons copy the test procedure or evidence list, for example into an evidence request email.

Keyboard shortcuts

↑ ↓	Move through the list
Ctrl + Enter	Save the comment
Esc	Back to the list or Findings

5.5 Recording an answer

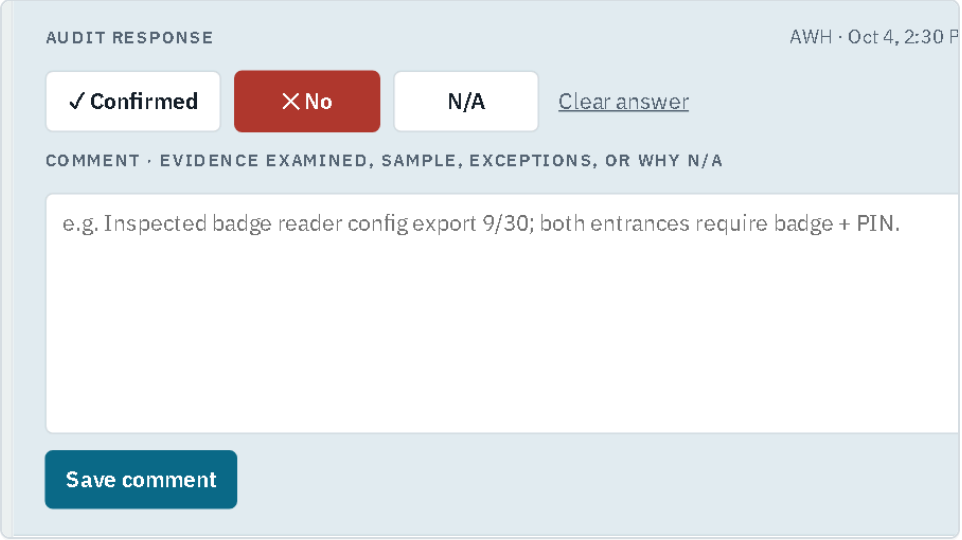


Figure 5.5 The audit response area of an unanswered control.

1. Read the control and its **suggested test procedure**, and gather the **evidence** listed.
2. Perform the test.
3. Select the result:
   - ✓ **Confirmed** if the control is in place and operating.
   - ✕ **No** if it is not. This creates an exception in Findings.
   - **N/A** if the control doesn't apply. Say why in the comment.

   The answer saves immediately.
4. Type your **comment** and select **Save comment** (or press `Ctrl` + `Enter`). "Unsaved changes" appears until you do.
5. The panel stays on the control after you answer, so you can finish the comment. Select the next control in the list, or use **Back** on a phone.

> **NOTE**
> Selecting the chosen answer again, or **Clear answer**, removes it. In the standalone edition each save goes straight into the workbook (chapter 9).

5.6 Writing good comments

Your comment becomes **part of the finding**. In the Findings report it is added as a sentence straight after the statement of fact. Write it as a complete sentence that a reader of the audit report will understand: what you examined, the sample, and any exceptions, or why the control doesn't apply.

GOOD	WEAK
No visitor log was kept for two of the five sampled dates.	no log 2/5
Traced 25 badge holders to approved access requests with no exceptions.	ok, checked

The review tidies comments when it builds the report: it capitalises the first letter, adds a full stop if missing, and removes extra spaces and line breaks. Remove test notes such as "This is a test" before the report is issued.

5.7 Changing an answer

- **From the Plan tab:** open the control, select a different answer, or edit the comment and save it.
- **From Findings:** select the small **Edit** link at the end of any statement. The control opens in the Plan tab, and ← **Back to Findings** returns you to the same place in the report.

5.8 Working as a team

- Several people can work at the same time. Answers others save appear on your screen within a few seconds, without reloading.
- If someone changes the control you are typing a comment on, your unsaved text is kept.
- The top right of the panel shows who last answered the control and when.
- Divide the work by category to avoid two people testing the same control.

5.9 Evidence files

Standalone edition only. Below the audit response, each control has an **Upload/View Evidence** section for the documents, screenshots, photos and exports you examined.

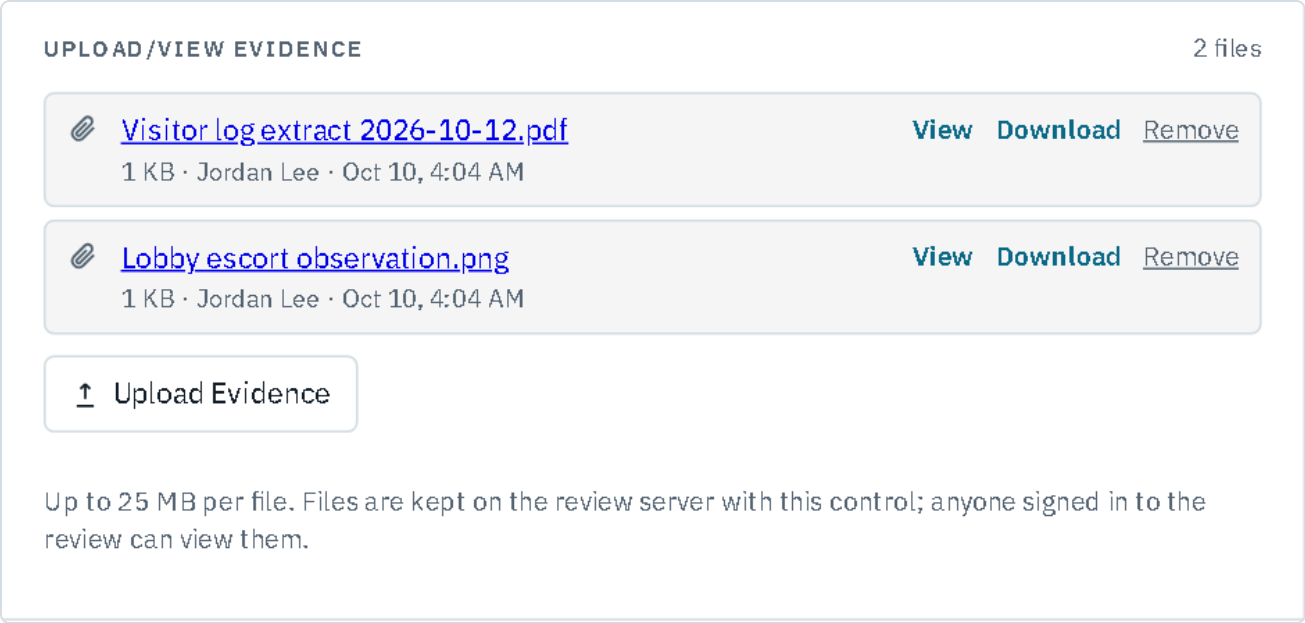


Figure 5.6 Upload/View Evidence, with two files uploaded.

1. Open the control on the Plan tab.
2. Select **Upload Evidence** and choose one or more files, or drag files from your computer onto the section. Each file can be up to 25 MB.
3. The files appear in the list with their size, who uploaded them and when. Everyone working on the review sees them within seconds.

- **View** opens a PDF, image or text file in a new tab. Other files, such as Word, Excel or zip files, download instead; they are never opened inside the review. **Download** always saves the file.
- **Remove** deletes a file from the review server after you confirm. Only remove a file uploaded by mistake: the evidence is part of the audit record.
- Controls with evidence show a paperclip and the number of files in the list.
- A file with the same name as one already on the control is kept as a second copy, for example `Key log (2).pdf`.
- The Findings tab lists all the evidence by category (section 6.5).

> **EVIDENCE IS PART OF THE RECORD**
> Name files so a reader can tell what they are, for example `Badge reader config export 2026-10-12.pdf`, and still describe what you examined in the comment. The files are kept on the review server; everyone signed in to the review can view them.

CHAPTER 6

The Findings tab

Findings turns the answers into report-ready text. It updates as soon as anyone saves an answer.

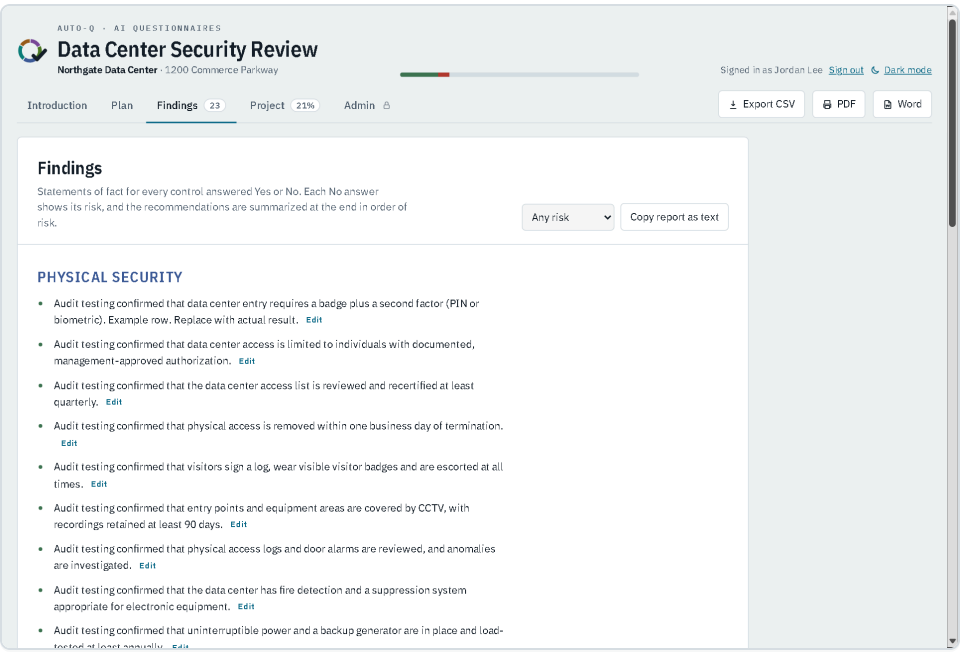


Figure 6.1 The Findings tab: statements of fact for confirmed controls, grouped by category, each with an Edit link.

6.1 How the statements are built

ANSWER	IN FINDINGS
Confirmed	A green bullet with the positive statement, such as "Audit testing confirmed that ...", followed by your comment.
No	A red bullet in **Exceptions** with the negative statement, your comment, then **Risk (High / Moderate / Low)** and the effect.
N/A	Not shown. N/A controls are left out of the report.
Answer	Not shown until answered.

6.2 Exceptions

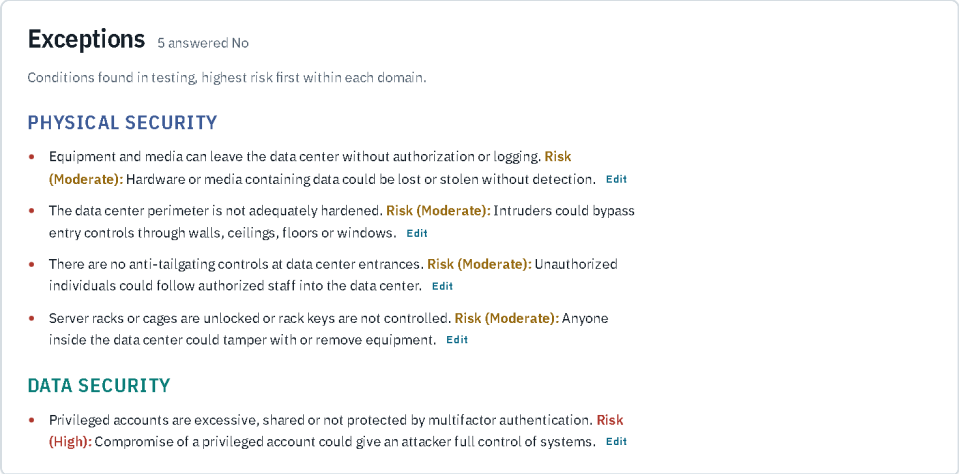


Figure 6.2 Exceptions, highest risk first within each category.

6.3 Summary of recommendations

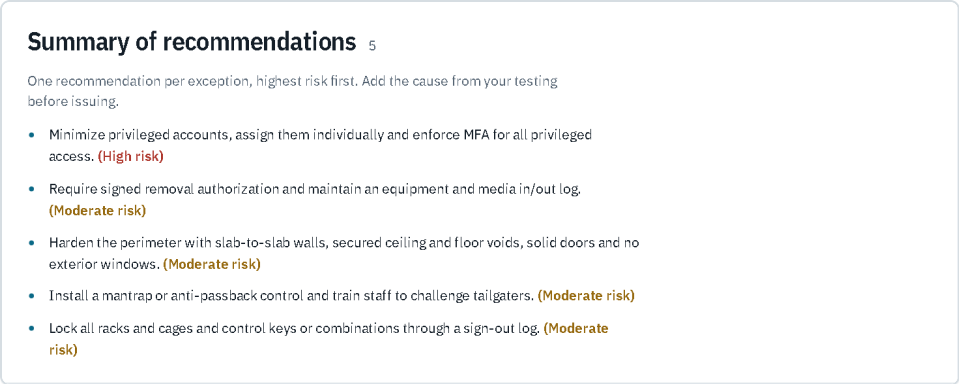


Figure 6.3 One recommendation for each exception, ordered from high to low risk.

> **BEFORE ISSUING**
> Recommendations come from the questionnaire. Add the **cause** you found during testing before the report is issued.

6.4 Filtering, editing and copying

- **Search the findings:** type a control ID, or words from a control, its finding, its recommendation, a framework reference or a comment, and only the controls with every word you typed stay on the page, with a count of how many are confirmed and how many are exceptions. Press Esc, or select **Clear the search**, to see them all again. Copy report as text, the PDF and Word follow the search too.
- **Filter by risk:** show only High, Moderate or Low risk controls, for example to review high-risk exceptions first. Copy and PDF follow the filter and say so in their heading.
- **Edit:** opens that control in the Plan tab (section 5.7).

- **Copy report as text:** copies the whole report as plain text with bullets, ready to paste into a Word report or working papers.

6.5 Evidence files

Standalone edition only. The Findings tab ends with **Evidence files**: every control with uploaded evidence (section 5.9), grouped by category. Each control shows its ID, statement and answer, then its files with their size, who uploaded them and when, and **View** and **Download** links. Select the control ID to open it on the Plan tab.

Figure 6.4 Evidence files on the Findings tab, by category.

The risk filter applies here too. **Copy report as text** and the **PDF** and **Word** files end with the list of file names by category; the files themselves stay on the review server.

CHAPTER 7

The Project and Admin tabs

The Project tab shows how far the review has got. The Admin tab, for the audit lead, holds the data center details, the project reports (section 8.3), the workbook backups, the review's passwords and Clear All.

7.1 Project status

The Project tab shows the progress of the review by category. It doesn't list individual controls.

Project Status

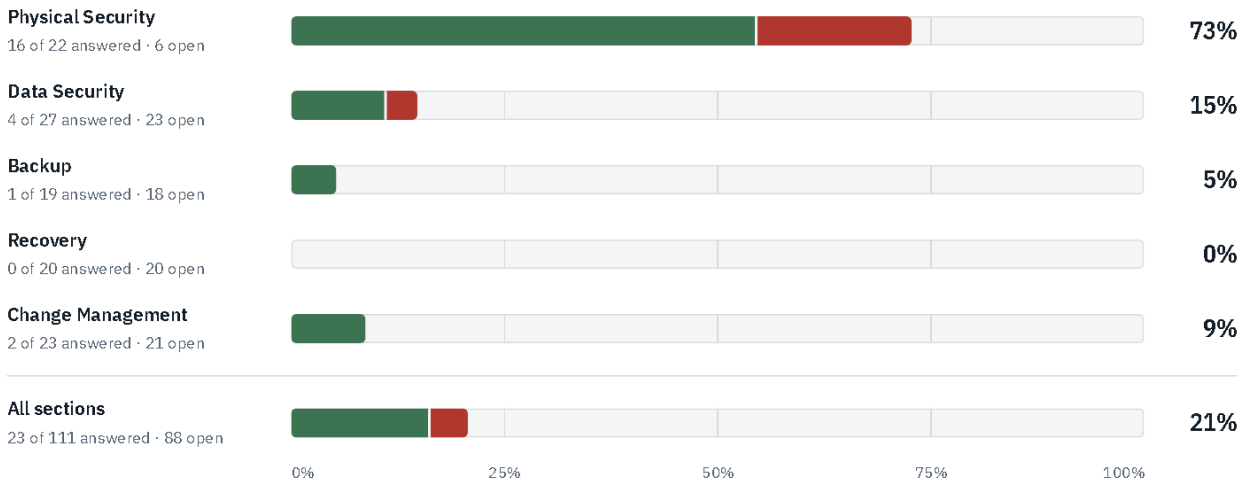
Progress of the audit by section. A control counts as complete once it is answered Yes, No or N/A.

21% complete

23 of 111 controls · 0 of 5 sections done

Percentage complete by section

Yes · No · N/A · Not answered



Summary by section

SECTION	CONTROLS	YES	NO	N/A	NOT ANSWERED	COMPLETE	HIGH-RISK NO	STATUS
Physical Security	22	12	4	0	6	73%	0	In progress
Data Security	27	3	1	0	23	15%	1	In progress
Backup	19	1	0	0	18	5%	0	In progress
Recovery	20	0	0	0	20	0%	0	Not started
Change Management	23	2	0	0	21	9%	0	In progress
All sections	**111**	**18**	**5**	**0**	**88**	**21%**	**1**	In progress

Work calendar

Days on which answers were saved or evidence was uploaded, from their time stamps. A control changed later counts on the day of its latest save. Select a day to see what was done.

2	Oct 4	Oct 6	21	3
days worked	first day	latest day, 2026	on the busiest day, Oct 4	people

Less · More

October 2026

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17

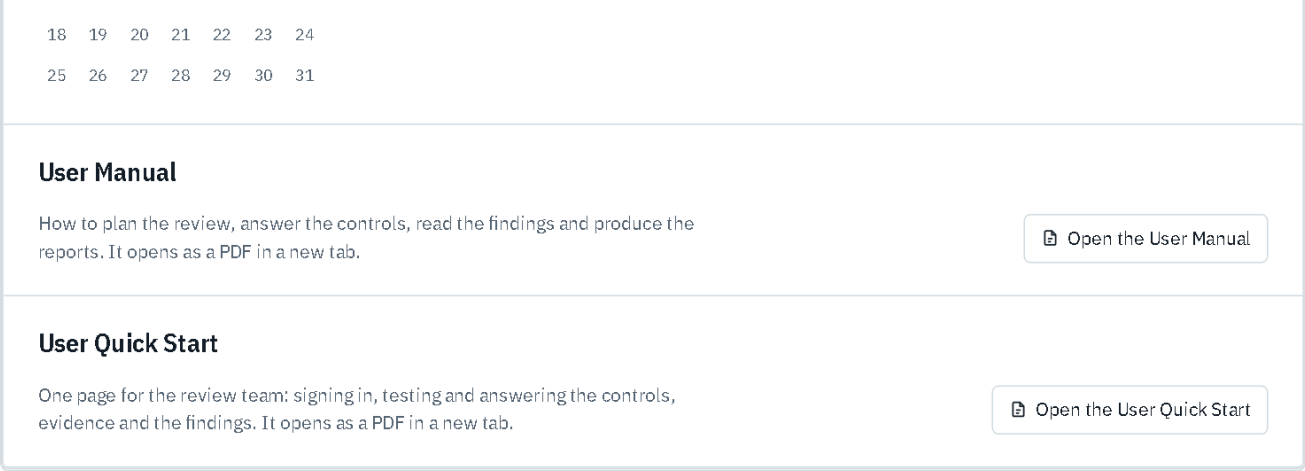


Figure 7.1 The Project tab: the overall percentage, the chart by category and the summary table.

- **Overall figure:** the percentage complete, controls answered, and how many of the five categories are finished. A control counts as complete once it's answered Confirmed, No or N/A.
- **Percentage complete by section:** one bar per category plus a total. Green is Yes (Confirmed), red is No, grey is N/A, and the empty part is still to answer. Hover over a bar segment for its exact count.
- **Summary by section:** counts of each answer, percentage complete, high-risk No answers, and a status:

STATUS	MEANING
Not started	No controls in the category are answered.
In progress	Some are answered.
Complete	Every control in the category is answered.

In the standalone edition, the bottom of the Project tab has **Open the User Manual**, which opens this manual as a PDF in a new tab, and **Open the User Quick Start**, a one-page summary of the same steps.

7.2 Unlocking the Admin tab

The Admin tab is protected by an **administrator password**, which only the audit lead and other administrators should know. Selecting the tab shows a password box and nothing else.

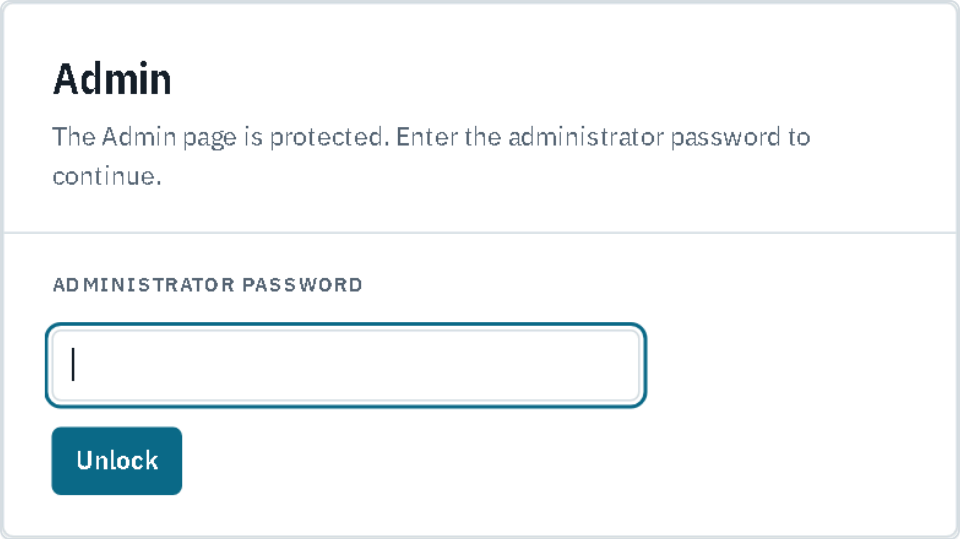


Figure 7.2 The Admin tab before it is unlocked.

1. Select the **Admin** tab.
2. Type an administrator password and select **Unlock** or press `Enter`. Either works:
   - the review's **own** administrator password, if it has one, which unlocks the Admin tab of this review only;
   - the **shared** administrator password, which unlocks the Admin tab of every review on the computer.
3. When you've finished, select **Lock** at the top right of the page, especially on a shared computer.

- **One section at a time:** once unlocked, the buttons under the Admin heading (**Data center details**, **Reports**, **Backups**, **Project**, **Passwords**, **Clear All** and **Manuals**) each show one section. Your browser remembers the last one you chose. A section the review can't use, such as content packs in Hosted AutoQ, has no button.
- **Wrong passwords** count toward the same limit as sign-in. After three wrong passwords in a row the computer is blocked for 15 minutes, and every attempt is recorded in the security log (section 11.3).
- **It locks again by itself** 30 minutes after your last action on the Admin tab. Unlocking it is only for you: it doesn't unlock Admin for anyone else.
- **Hosted AutoQ:** the project lead password unlocks it, and it offers everything except content packs and the server's own settings (section 2.7).

Admin

Data center details, reports, backups, the project archive, passwords, Clear All, and the manuals and guides.

Lock

Data center

DATA CENTER NAME

Northgate Data Center

ADDRESS

1200 Commerce Parkway
Springfield, IL 62701

CONTACT NAME

Pat Rivera

PHONE NUMBER

(217) 555-0142

Save details Last saved by Jordan Lee, Oct 10, 2026, 4:03 AM.

Reports

Make the opening conference letter, the project status report, the project review meeting agenda and the final report as PDF files. Figures, exceptions and ratings come from the answers; the details and wording below are yours. The wording can use values such as `{{client}}`, `{{projectName}}` or `{{exceptions}}`. A blank line starts a new paragraph, and lines starting with "- " become a list.

Backups

Refresh

Copies of the workbook, newest first. The server makes one when it starts, before every Clear All and before a project is re-loaded, and keeps the 30 most recent in C:\Program Files\Data Center Security Review\data\data-center\backups.

DATE AND TIME	MADE	SIZE	
Oct 10, 2026, 4:03 AM	Server started	55 KB	Download

Project archive

Download this review's project files as one .zip: the workbook with every answer and comment, the review's settings, site and report details, the report logo, evidence files and created reports. Passwords, backups and the security log aren't included. Keep it as a record, or re-load it here or on another server.

Download project (.zip)

Re-load a project

Replaces this review's workbook, answers, evidence, reports and details with those in a project .zip. The review keeps its address and passwords. Everything it replaces is moved to a folder in backups first, so nothing is lost. This affects everyone using this review.

Choose a project .zip...

Passwords

Each review can have its own sign-on and administrator passwords; until it does, it uses the shared ones. The shared administrator password always works, in every review. Each change needs the current administrator password, and new passwords must be at least 8 characters.

(●) This review's passwords ( ) Shared passwords

This review's sign-on password

People enter it to open this review. Anyone else signed in to this review must enter the new one.

This review uses the shared sign-on password.

CURRENT ADMINISTRATOR PASSWORD

NEW SIGN-ON PASSWORD

REPEAT NEW PASSWORD

Set this review's sign-on password

This review's administrator password

Unlocks this review's Admin page and confirms its Clear All. Anyone else with it unlocked is locked out.

This review uses the shared administrator password.

CURRENT ADMINISTRATOR PASSWORD

NEW ADMINISTRATOR PASSWORD

REPEAT NEW PASSWORD

Set this review's administrator password

Clear All

Clear every answer and comment to start a new review. This affects everyone using this page and can't be undone.

Clear all answers and comments...

Manuals and guides

Every manual, quick start and guide in the docs folder on the server. Some contain the passwords, so they open only while this page is unlocked, and each opening is recorded in the security log.

User Manual

Planning the review, answering the controls, reading the findings and producing the reports.

Data-Center-Security-Review-User-Manual.pdf · PDF · 1.6 MB

Open

User Quick Start

One page for the review team: signing in, testing and answering the controls, evidence and the findings.

Data-Center-Security-Review-User-Quick-Start.pdf · PDF · 143 KB

Open

Administrator Manual

Installing and running the server, addresses, passwords and HTTPS, backups and troubleshooting.

Data-Center-Security-Review-Administrator-Manual.pdf · PDF · 870 KB

Open

Administrator Quick Start

One page, eight steps: install, secure it, let the team connect, run the review and start

Open

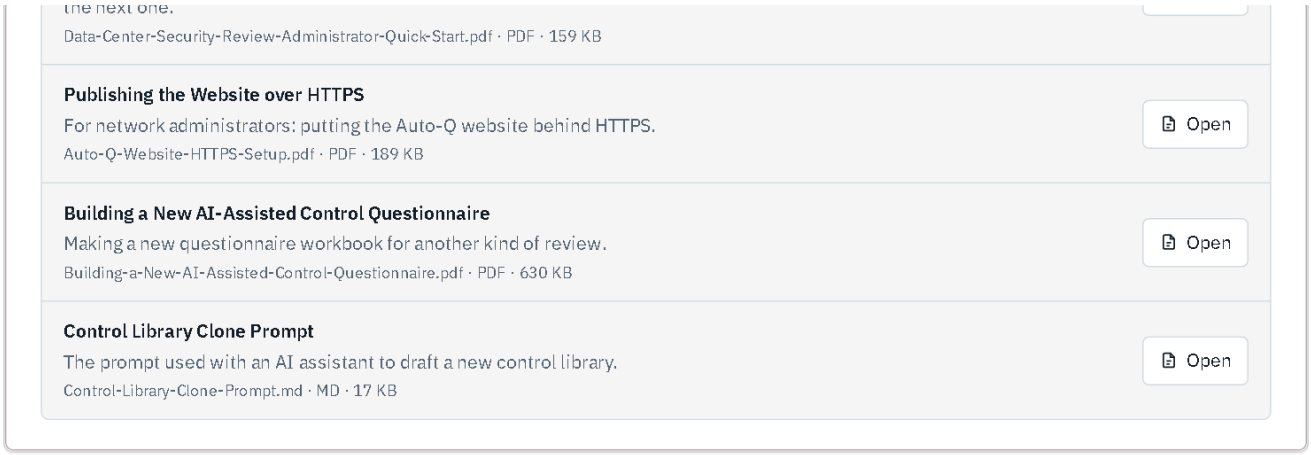


Figure 7.3 The Admin tab's sections once unlocked (standalone edition), with the Reports section folded up. On screen, the menu under the Admin heading shows one of them at a time. Section 8.3 shows Reports in full.

In the standalone edition the bottom of the unlocked Admin tab lists **Manuals and guides**: every manual, quick start and guide in the docs folder on the server, each with an **Open** button. Some contain the passwords, so the server opens them only while the Admin tab is unlocked, and records each opening in the security log.

7.3 Data center details

Record which data center the review covers: its **name**, **address**, a **contact name** and their **phone number**. Type them in and select **Save details**. The page shows who saved them last and when.

Once saved, the name and the first line of the address appear under the title at the top of every tab, for everyone using the review (Figure 3.1), and the name appears on the review's card in the list of reviews. Each review has its own details. In the standalone edition they are kept on the server, in the `settings.json` file in the review's folder, and copied to a **Site Details** sheet in the review's Excel workbook (chapter 9). If someone has the workbook open in Excel, the details are saved but the sheet isn't updated until you save again with Excel closed.

7.4 Backups

Standalone edition only. The **Backups** section lists the copies of the workbook that the server has saved (section 9.5), newest first, with when each was made, why (*Server started*, *Before Clear All*, *Before re-loading a project* or *Before restoring a backup*) and its size. Select **Download** to save a copy, for example to look at earlier answers in Excel, and **Refresh** to update the list.

To put a backup back in use, select **Restore** beside it, check the date and the number of answers it will replace, type the administrator password and select **Restore backup**. The server first saves the current workbook as a backup (*Before restoring a backup*), so a restore can itself be undone, then puts the chosen copy in its place for everyone. Your page reloads when it finishes. Evidence files, reports and the review's details aren't changed. Restoring is turned off in the demo.

Project archive

Standalone edition only. **Download project (.zip)** saves the whole review as one file: the workbook with every answer and comment, the site and report details, the report logo, the evidence files and the reports made so far. Passwords, backups and the security log aren't included. Keep it with your audit records, or use it to move the review to another server.

To bring a project back, select **Choose a project .zip...**, check the file name and the number of answers it will replace, type the administrator password and select **Re-load project**. The server checks the file first and changes nothing if it isn't a project .zip. It replaces this review's workbook, answers, evidence, reports and details for everyone, but the review keeps its address and passwords, and everything replaced is moved into the backups folder. Your page reloads when it finishes; anyone else reloads theirs to see any changed controls. The Administrator Manual (section 7.9) has the details.

7.5 Passwords

Standalone edition only. Every review uses the **shared** passwords until it is given its own. Giving a review its own sign-on password keeps it apart from the other reviews on the computer, for example when each client has its own review.

PASSWORD	WHAT IT DOES
Shared sign-on	Opens every review that doesn't have its own sign-on password.
The review's own sign-on	Opens this review only.
Shared administrator	Unlocks the Admin tab of every review and opens every review at sign-in. It always works, so a review can't be locked away from the person who runs the computer. Only it can change the shared passwords.
The review's own administrator	Unlocks this review's Admin tab and confirms its Clear All.

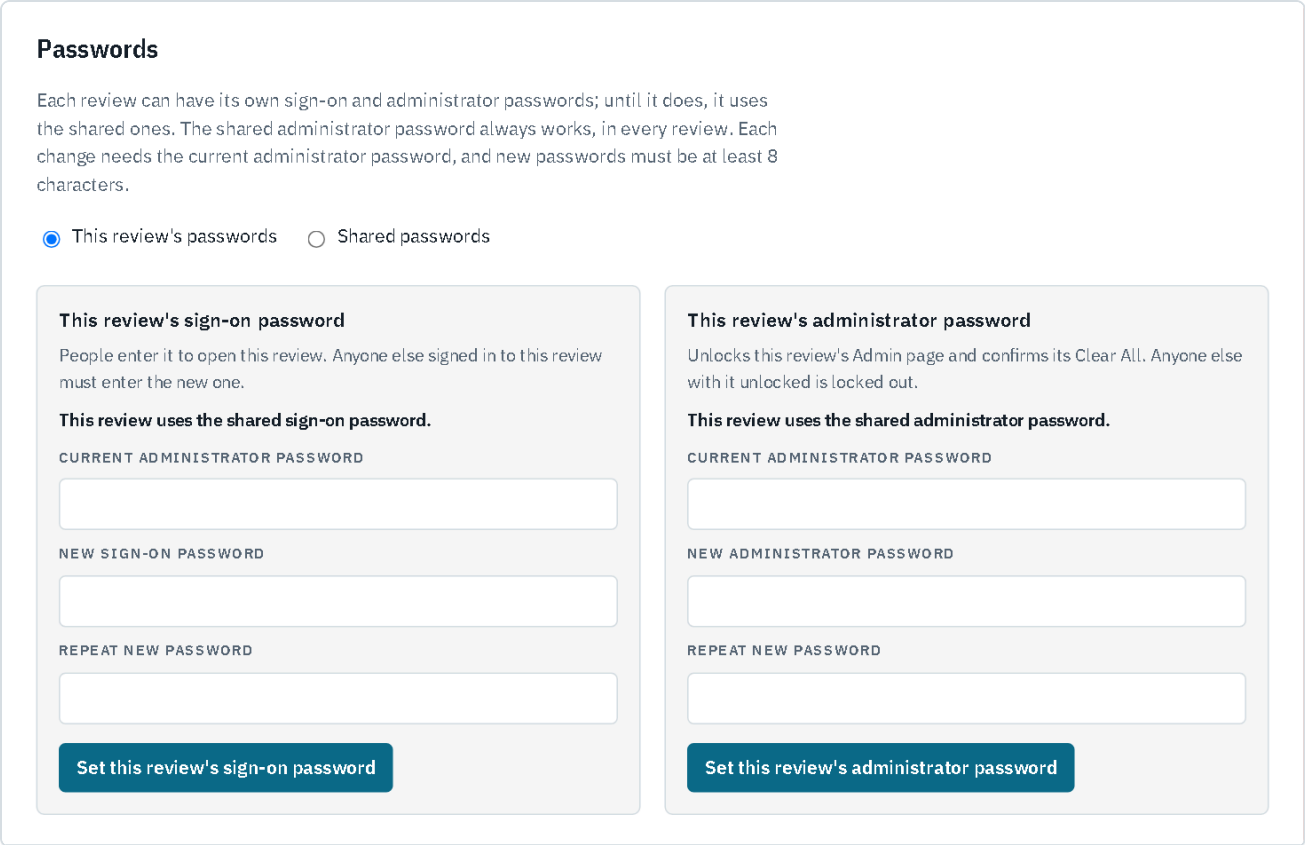


Figure 7.4 The Passwords section, unlocked with the shared administrator password. Each form says whether this review uses the shared password or has its own.

To give the review its own password, or change it:

1. Unlock the Admin tab and scroll to **Passwords**. If you unlocked it with the shared administrator password, choose **This review's passwords**.
2. In the sign-on or administrator form, type the **current administrator password**: the review's own, or the shared one.
3. Type the **new password** twice. It must be at least 8 characters, can't start or end with a space, and must differ from the review's other password and from the shared administrator password.
4. Select **Set this review's sign-on password** (or administrator password). Once the review has its own, the button reads **Change ...**.
5. Tell the people who need the new password, in person or through your password manager.

- **Changing a review's sign-on password** signs everyone else out of that review; they enter the new password to open it again. Their other reviews stay open. You stay signed in.
- **Changing a review's administrator password** locks anyone else who has this review's Admin tab unlocked.
- **Use the shared password** appears under a password the review has its own of. Type the current administrator password and select it to go back to the shared password.

- **Shared passwords** can be changed only after unlocking with the shared administrator password: choose **Shared passwords** at the top of the section. Changing the shared sign-on password signs everyone else out of every review that uses it.

7.6 Clearing all answers

At the bottom of the Admin tab, **Clear all answers and comments** deletes every answer and comment in this review so a new review can start. It affects everyone using the review, can't be undone from the page, and doesn't touch other reviews on the computer.

1. Select **Clear all answers and comments...**.
2. The review asks **Are you sure?** and shows how many answers and comments will be deleted. Select **Export CSV first** if you need a record, then **Yes, continue**.
3. Enter an **administrator password** again (the review's own or the shared one) and select **Clear all answers**.

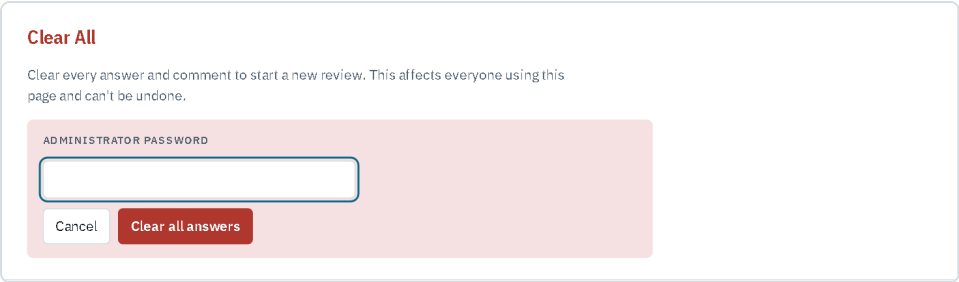


Figure 7.5 The password step of Clear All.

A wrong password clears nothing. In the standalone edition the server saves a copy of the workbook in the backups folder before clearing (section 9.5), and moves the review's evidence files into the same folder, so the next review starts with none and nothing is deleted. The data center details and passwords are kept; update the details if the next review is of a different site.

CHAPTER 8

Reports and exports

Three buttons on the right of the menu produce files from the tab you're on: Export CSV, PDF and Word. The audit lead also makes the review's formal reports, from the Reports section of the Admin tab (section 8.3).

8.1 PDF and Word

The **PDF** button creates a PDF of the tab you're on, with page numbers and the report name in the footer. Files are named like `data-center-security-review-findings-2026-10-04.pdf`.

The **Word** button saves the same content as a Word document (`.doc`) that you can edit, for example to add the cause of each exception before pasting the findings into your report. It opens in Microsoft Word, and in other word processors that read Word files. Files are named like `data-center-security-review-findings-2026-10-04.doc`. The Project tab's chart is drawn as a table of colored bars.

ON THIS TAB	THE PDF OR WORD DOCUMENT CONTAINS
Introduction	The executive overview and instructions, with a one-row workflow diagram.
Plan	The controls currently shown, with your filters applied: ID, statement, answer, risk and comment.
Findings	The full findings report: confirmed facts, exceptions with risks, and recommendations. It follows the risk filter.
Project	The overall percentage, the chart by category, the summary table and the days worked.

8.2 Export CSV

Downloads a CSV file that opens in Excel, with one row for each of the 111 controls whatever your filters. It also makes a convenient evidence request list: filter it in Excel to your category and use the Evidence to Request column. Columns:

COLUMN	CONTENTS
Control ID, Domain, Subdomain, Control Assertion	What the control is
Control Type, Nature, Frequency	How the control operates
Risk Weight, Risk Level	1–3 and Low, Moderate, High

COLUMN	CONTENTS
NIST SP 800-53 Rev 5, ISO/IEC 27001:2022 Annex A, COBIT 2019	Framework references
Answer, Auditor Comment	Yes, No or N/A, and the comment
Statement of Fact	The positive or negative statement matching the answer
Effect (if No), Recommendation (if No)	Filled in only for No answers
Answered By, Last Updated	Who saved the answer, and when

8.3 Project reports

Standalone edition only. The **Reports** section of the Admin tab makes five reports as PDF files, on your letterhead, for the stages of a review. The figures, exceptions and ratings come from the answers at the moment you make the report; the project details and wording are yours.

REPORT	WHEN	WHAT IT CONTAINS
Opening conference letter	At the start, after the opening meeting	A letter to the addressee confirming the objectives, scope, the categories and number of controls, the frameworks, how ratings work, fieldwork dates, the audit team, arrangements, the information you will request, and how you will report.
Getting started guide	When the team starts, and for anyone who joins later	One page to hand to team members: the review's address, how to sign in (it never contains the password), how to answer a control, the tabs, the categories, each person's assignments, good practice, the deadline and who to ask for help. The address is the one you opened the Admin tab at; if the team uses another, for example the server computer's name instead of `localhost`, enter it under **Review address**.
Project status report	During fieldwork, as often as needed	Percentage complete, progress by category with bars, the exceptions found so far (highest risk first), issues and delays, next steps, and how many answers each auditor has recorded.
Project review meeting agenda	Before each review meeting with management	The meeting's date, time, location, chair, attendees and apologies, then numbered items: purpose, actions from the previous meeting, progress, exceptions for discussion, issues and risks, decisions needed, next steps, other business and the next meeting. It ends with a blank table for the actions agreed.

REPORT	WHEN	WHAT IT CONTAINS
Final report	At the end of the review	A cover page, executive summary with the overall rating, objectives and scope, ratings by category (chapter 10), a detailed finding for each exception (condition, effect, recommendation, evidence examined and criteria), a summary of recommendations, conclusion, management response, sign-off, and appendices of Not applicable controls and the result of every control. While controls are still unanswered it is marked *Draft*.

Reports

Make the opening conference letter, the project status report, the project review meeting agenda and the final report as PDF files. Figures, exceptions and ratings come from the answers; the details and wording below are yours. The wording can use values such as `{{client}}`, `{{projectName}}` or `{{exceptions}}`. A blank line starts a new paragraph, and lines starting with "- " become a list.

Logo

RA Riverside Assurance Group

Upload logo... | Remove logo

PNG or JPEG, up to 1 MB. It appears on the letterhead and on the final report's cover.

Project details

PROJECT NAME: Northgate Data Center Review 2026	CLIENT OR ORGANIZATION: Northgate Holdings Inc.
PREPARED BY (AUDIT ORGANIZATION): Riverside Assurance Group	AUDIT LEAD: Jordan Lee
LETTER ADDRESSED TO: Pat Rivera	ADDRESSEE'S JOB TITLE: Director of IT Operations
FIELDWORK STARTS: 10/12/2026	FIELDWORK ENDS: 10/23/2026
SIGNED BY: Jordan Lee	SIGNATORY'S JOB TITLE: Audit Director

OBJECTIVES

To assess whether the data center's physical, data security, backup, recovery and change management controls are designed and operating effectively.

SCOPE

The Northgate Data Center in Springfield, Illinois, and the backup and recovery arrangements for the systems hosted there.

AUDIT TEAM (ONE PERSON PER LINE): Jordan Lee, Audit Director Sam Okafor, Senior Auditor Maria Chen, IT Auditor	DISTRIBUTION (ONE NAME PER LINE): Pat Rivera, Director of IT Operations Audit Committee

Figure 8.1 The top of the Reports section: the logo and the project details shared by all four reports.

To make a report:

1. Unlock the Admin tab (section 7.2) and scroll to **Reports**.
2. The first time, select **Upload logo...** and choose your organization's logo, a PNG or JPEG file of up to 1 MB. It appears on the letterhead and on the final report's cover.

3. Fill in the **project details**: project name, client, your organization (Prepared by), audit lead, who the letter is addressed to, fieldwork dates, who signs the reports, objectives, scope, the audit team and the distribution list (one name per line). Anything left empty is simply left out of the reports.
4. Under **Report wording**, choose the report. Set its date and check the wording of each text block (Figure 8.2). The agenda also asks for the meeting's time, location, chair, attendees and apologies.
5. Select **Preview** to see the report in a new tab, or **Create PDF** to make it. Both save your details and wording first. Making the PDF takes a few seconds.
6. Select **Download the PDF** in the message that appears, or **Download PDF** beside it in the **Created reports** list.

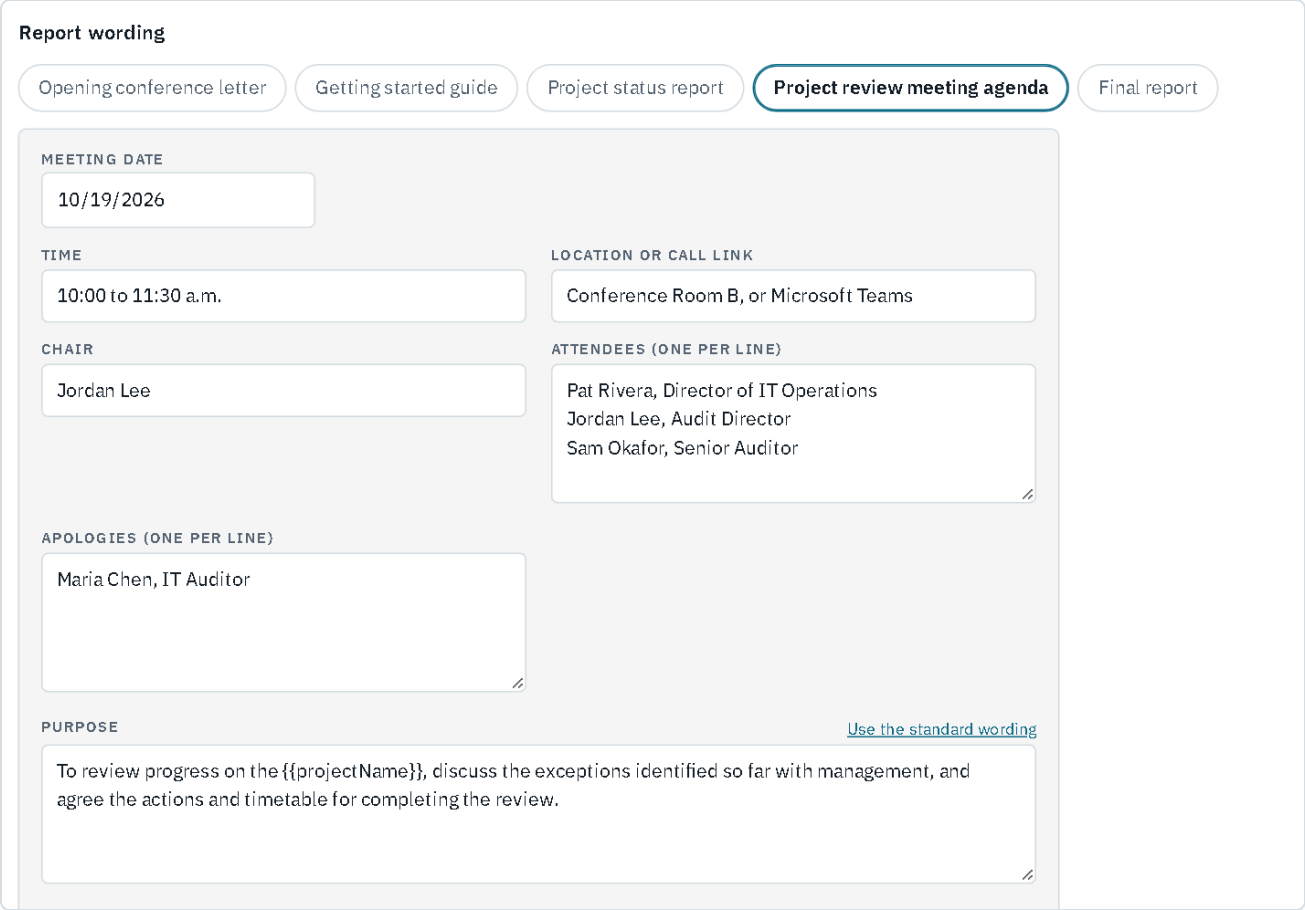


Figure 8.2 Report wording, with the meeting agenda selected: the meeting details, then a text block for each part of the agenda.

The wording. Each text block starts with standard wording. Change it as you like; **Use the standard wording** puts it back. Blocks that start empty, such as the final report's management response, are left out until you write something.

- **Values from the review** can go in the wording between double braces, and are filled in when the report is made: for example `{{client}}`, `{{projectName}}`, `{{fieldworkEnd}}`, `{{percentComplete}}`,

`{{answered}}`, `{{controls}}`, `{{exceptions}}`, `{{highRiskExceptions}}`, `{{notAnswered}}` or `{{overallRating}}`. `{{client|your organization}}` uses the words after the bar when the client is empty.

- **Paragraphs and lists:** leave a blank line between paragraphs, and start lines with "- " to make a bulleted list.

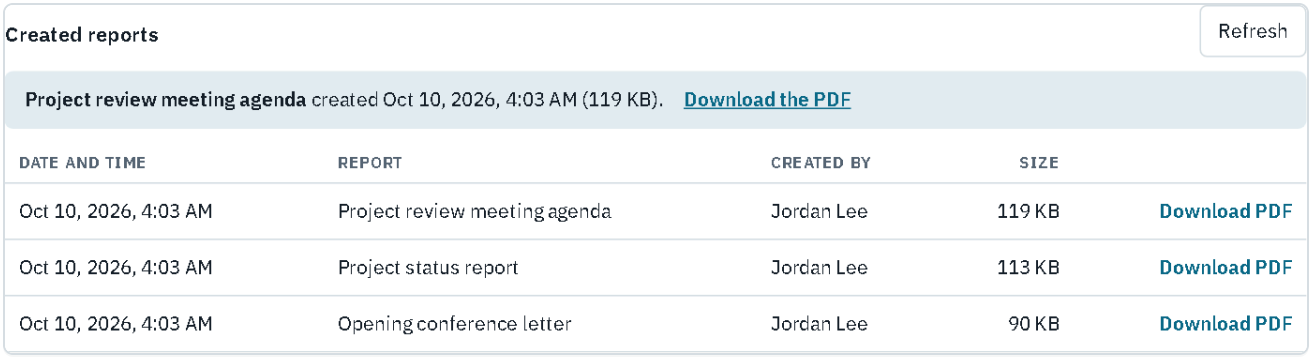


Figure 8.3 Created reports, newest first, with who made each and a download link.

Created reports lists every PDF made for this review, newest first, with when it was made, by whom and its size. The server keeps the 60 most recent in the review's `reports` folder, and records each one made in the security log (section 11.3). Each report is a snapshot: make it again after more answers are recorded to bring it up to date.

> **CHECK BEFORE YOU SEND**
> The reports use the statements, effects and recommendations from the workbook. Read each report, add the cause from your testing to the findings, and correct anything that doesn't fit before sending it. For a different layout or wording for every review, your administrator can change the report templates (Administrator Manual).

CHAPTER 9

The Excel workbook

In the standalone edition the Excel workbook is the review's database. This chapter explains what is saved where, and how to work with Excel safely.

9.1 Where answers are saved

Each review is a folder in the `data` folder of the installation, holding its workbook. The Data Center Security Review is normally `data\data-center\DataCenter_Audit_Control_Library.xlsx`. Answers go on the **Questionnaire** sheet, one row per control from row 5:

COLUMN	HOLDS
H, Answer (T/F/NA)	T for Confirmed, F for No, `NA` for N/A
I, Evidence Examined	Kept as it is. Not shown in the review.
J, Auditor Comment	The comment typed in the review
N, Answered By	The name the person signed in with
O, Last Updated	The date and time of the save

Installations from before several reviews were possible keep the workbook directly in the `data` folder. That still works the same way.

9.2 Formulas and ratings

The workbook's own formulas (Statement of Fact, Effect, Recommendation and the Domain Summary ratings) read column H. Excel recalculates them every time the file is opened, so the workbook always agrees with the review. Failed controls are highlighted in the Questionnaire sheet, and the answer drop-down still offers T, F and NA.

The controls themselves are read from the **Control Library** sheet. If you change a control's wording there, the review shows the change the next time the file is saved or the server restarts.

9.3 Working with Excel while the review is running

> IMPORTANT
>
> **Close the workbook in Excel while people are saving answers.** Excel locks the file while it is open, and saves from the review then fail with "Not saved: the workbook is open in Excel". Nothing is lost: close Excel and save again.

- To look at results without locking the file, open a *copy*, or use the Export CSV, PDF or Word button.

- If you edit the workbook in Excel and save it while the review is running, the review notices within a few seconds and every open screen updates.

9.4 Several reviews on one computer

To run a separate review, for example one per data center or per year, the audit lead adds a folder for it in the `data` folder, with its own copy of the workbook. It appears in the list of reviews straight away, with its own answers, backups, data center details and, if wanted, its own passwords (section 7.5). The Administrator Manual describes the steps.

9.5 Backups

The server saves a copy of each review's workbook in a `backups` folder next to it, for example `data\data-center\backups`, when it first opens the workbook and before every Clear All. The 30 most recent copies are kept, and the Admin tab lists them with **Download** and **Restore** for each (section 7.4). The server can also be restored by hand: stop it, copy the backup over the workbook, and start it again.

The review's folder also holds `settings.json`, created the first time someone saves the data center details or gives the review its own password. The shared passwords and the security log are kept for all reviews together in the `data` folder (section 11.3).

9.6 Importing answers

Answers kept in a JSON backup file, such as `responses-backup.json` (a snapshot taken from the single-file page), can be copied into a review's workbook. Stop the server first, then run this in a command prompt in the installation folder, naming the backup and then the workbook:

```
node server\import-backup.js data\data-center\responses-backup.json data\data-center\Data
Center_Audit_Control_Library.xlsx
```

Add `--replace` to clear the workbook's existing answers first. A copy of the workbook is saved in its `backups` folder before the import.

CHAPTER 10

How categories are rated

The workbook's Domain Summary sheet rates each category from its answers, using the risk weights (1 low, 2 moderate, 3 high).

RATING	WHEN
Incomplete	Until every control in the category is answered.
Ineffective	Two or more high-risk controls answered No, or a weighted failure rate above 30%.
Partially effective	Any high-risk control answered No, or a weighted failure rate of 10% or more.
Effective	Otherwise.

The **weighted failure rate** is the total risk weight of the controls answered No, divided by the total risk weight of the controls that apply. N/A answers are left out. For example, a category with applicable weights totalling 40, where controls weighing 2 and 3 failed, has a weighted failure rate of 5 ÷ 40 = 12.5%. If neither failure is high risk, that rates as Partially effective.

> **NOTE**
> These thresholds are starting assumptions. The audit lead can change them in the workbook's Domain Summary sheet to match your audit methodology.

CHAPTER 11

Running the review (audit lead)

This chapter is for the person who sets up and looks after the standalone edition.

11.1 Sharing with the team

By default only the computer running the review can open it. To let others on your network use it, start it like this in a command prompt in the review folder:

```
set HOST=0.0.0.0
start.cmd
```

Your team then opens `http://<computer-name>:3000/`; running `hostname` in a command prompt shows the computer's name. Windows Firewall may ask you to allow Node.js the first time.

11.2 Passwords

PASSWORD	USED FOR	CHANGE IT
Shared sign-on	Signing in to every review that doesn't have its own sign-on password	Admin tab, unlocked with the shared administrator password (section 7.5)
A review's own sign-on	Signing in to that review	That review's Admin tab (section 7.5)
Shared administrator	Every review's Admin tab and Clear All, signing in to every review, and changing the shared passwords	Admin tab, unlocked with it (section 7.5). Hosted AutoQ has no shared passwords.
A review's own administrator	That review's Admin tab and Clear All	That review's Admin tab (section 7.5)

Passwords set on the Admin tab are kept in a scrambled form (salted and hashed) from which they can't be read back: the shared ones in `data\settings.json`, and a review's own in the `settings.json` in its folder. Until a shared password is changed, the default from the Administrator Manual applies.

If a password is forgotten, stop the server and open the right `settings.json` in Notepad. For a shared password, delete the `"adminPassword"` or `"accessPassword"` entry in `data\settings.json`; the default works again. For a review's own password, delete `"reviewAdminPassword"` or `"reviewAccessPassword"` in the review's folder; the review then uses the shared password. Save, start the server, and set a new password straight away.

Give the passwords to your team in person or through your organization's password manager, not in this manual or by email. Keep the shared administrator password to yourself: it opens every review.

11.3 The security log

Failed sign-ins, Admin tab unlocks and password changes for every review are recorded in one `security.log` in the `data` folder, and shown in the server window. Each line has the time, the type of event, the review where relevant, the computer's address and the name:

EVENT	MEANING
FAILED	A wrong sign-on or administrator password, with the count so far (for example 1 of 3)
VIOLATION	The third failure in a row; the computer is blocked for 15 minutes
BLOCKED	A sign-in or unlock attempt while the computer was blocked
ADMIN	Someone unlocked a review's Admin tab, opened the Administrator Manual, or used Clear All
REPORT	Someone made a project report, which one and for which review
EVIDENCE	Someone uploaded or removed an evidence file, with its name and control
PASSWORD	A password was changed or reset to the shared one, which password and for which review, and how many other people were signed out or locked out

To lift a block early, restart the server. The limits are `MAX_FAILURES` (3) and `LOCKOUT_MINUTES` (15) at the top of `server\server.js`.

11.4 Settings

Set these in the command prompt before running `start.cmd`:

SETTING	DEFAULT	PURPOSE
PORT	`3000`	The port in the address
HOST	`127.0.0.1`	`0.0.0.0` lets other computers connect
REVIEWS_DIR	`data`	The folder holding the reviews
WORKBOOK	Not set	Run just this one workbook instead of a folder of reviews
PDF_BROWSER	Microsoft Edge, else Chrome	The browser that makes the project report PDFs (section 8.3)

11.5 Security considerations

- **Passwords, not identities:** anyone who knows a sign-on password can sign in under any name. It keeps out people without the password but doesn't prove who someone is.
- **Separate clients:** give each client's review its own sign-on password, so one client's team can't see another's review. Keep the shared administrator password to yourself, because it opens every review.
- **Plain HTTP:** the standalone edition uses `http://` unless HTTPS is set up, so passwords travel unencrypted over the network. Use it only on a trusted internal network, or add HTTPS (Administrator Manual).
- **Admin tab:** the server checks the administrator password, so the Admin tab can't be opened without it. Lock it when you leave a shared computer.
- **Lockouts are per computer:** people who reach the server through the same proxy share one failure count.
- **Sensitive content:** findings describe control weaknesses. Store exports, PDFs, project reports, evidence files and workbook backups with the same care as other audit working papers.

CHAPTER 12

Troubleshooting

Common problems and how to fix them.

PROBLEM	WHAT TO DO
The browser says the site can't be reached	The server isn't running. Start `start.cmd` and keep its window open. From another computer, check the server was started with `HOST=0.0.0.0` and that the firewall allows Node.js.
"Node.js is not installed"	Install Node.js 20 or later from nodejs.org, then run `start.cmd` again.
"Not saved: the workbook is open in Excel"	Close the workbook in Excel, then save again. Nothing was lost.
"That password is incorrect"	Check the sign-on password with your audit lead: the review may have its own. After three failures the computer is blocked for 15 minutes.
A review isn't in the list of reviews	It has its own password. Enter it under **Open another review**, or ask your audit lead for it.
"This review has its own password"	You followed a link to a review your password doesn't open. Enter that review's password.
A review's card says "Can't open"	Its workbook has a problem, which the card and the server window describe. Tell your audit lead.
Security violation	Wait for the countdown to finish, or ask the audit lead to restart the server.
Signed out unexpectedly	Sessions last 12 hours, and restarting the server signs everyone out. Sign in again.
A control I answered isn't in the list	The Plan tab shows Not answered controls by default. Set the Answer filter to Any answer, or select Clear filters.
The answer buttons are greyed out (hosted)	You have view-only access. Ask the owner for Contributor access.
A comment shows oddly in Findings	Comments are added to the statement as a sentence. Use Edit to rewrite it as a full sentence.

PROBLEM	WHAT TO DO
Copy report as text says it couldn't copy	Browsers block copying on plain `http://` from another computer. Use the Word or PDF button instead, or open the review on the server computer.
The Admin tab asks for the password again	It locks 30 minutes after the last action there, when someone selects Lock, when its administrator password is changed, and when the server restarts. It also asks when you move to another review and unlocked the first one with that review's own administrator password. Unlock it again.
Signed out of a review after its password changed	Changing a review's sign-on password signs everyone else out of that review. Ask the audit lead for the new password.
Forgot the administrator password	See section 11.2.
There is no Admin tab (hosted)	Only the page's owner and Editors see it.
Create PDF says no browser was found	The server makes report PDFs with Microsoft Edge or Google Chrome. Ask your administrator to install one on the server computer. Meanwhile, select **Preview** and print the preview to PDF from your browser.
A report leaves a word out	Check the spelling of the value between the braces in the wording (section 8.3); an unknown or empty value is left out. Add a fallback, such as `{{client|your organization}}`.
Clear All removed answers by mistake	Stop the server, copy the latest `before-clear-all` file from the backups folder over the workbook, and restart.

GETTING HELP

If the steps above don't solve it, ask your audit lead first: most problems are passwords or the server not running. Write to AutoQ support at **support@autoq-ai.com** with what you were doing, what you saw (a screenshot helps) and the server's version, shown on the Administrator Manual's cover and in the installer. For licences, renewals and invoices, write to **sales@autoq-ai.com**. Product news and manuals: **AutoQ-AI.com**.

APPENDIX

Glossary and quick reference

A.1 Glossary

Review	One workbook with its answers, data center details and, optionally, passwords of its own. One computer can run several.
Shared password	The sign-on or administrator password used by every review that doesn't have its own.
Category	One of the five areas of the questionnaire, such as Physical Security. The workbook calls these domains.
Control	A statement of something that should be in place, which you test and answer.
Confirmed	The answer for a control that is in place (Yes, or T in the workbook).
Exception	A control answered No. It appears in Findings with its risk and recommendation.
Statement of fact	The report sentence generated from an answer.
Risk weight	1 (low), 2 (moderate) or 3 (high), used for ordering findings and for ratings.
Control type	Directive (policy), Preventive (stops an event), Detective (finds it afterwards) or Corrective (restores afterwards).
Nature	Manual, Automated, or IT-dependent manual (a person acting on system-generated information).
Weighted failure rate	Failed risk weight divided by applicable risk weight, used in category ratings.

A.2 Quick reference

Data Center Security Review at a glance

START AND SIGN IN

- Start menu → Data Center Security Review, or `start.cmd`
- Your name + the sign-on password (shared, or the review's own)
- Several reviews: pick one; **Open another review** adds one
- 3 wrong passwords: 15-minute block
- Admin tab: administrator password; Lock when done

ANSWER A CONTROL

- Plan tab (shows Not answered)
- Open a control, test it
- ✓ Confirmed, ✕ No or N/A
- Comment as a full sentence; `Ctrl` + `Enter` saves
- Upload Evidence, or drop files on the control

REVIEW

- Findings: facts, exceptions, recommendations
- Filter by risk; Edit to correct
- Project: progress by category

REPORT

- PDF or Word button on any tab
- Copy report as text from Findings
- Export CSV for working papers
- Admin → Reports: opening letter, getting started guide, status report, meeting agenda, final report

EXCEL

- Answers: Questionnaire sheet, columns H, J, N, O
- Close Excel while others are saving
- Backups in the review's backups folder, listed on the Admin tab

LINKS

- Review: `…:3000/r/data-center/`
- `#plan` · `#facts` · `#project` · `#admin`
- `#PH-05` opens a control
- `Esc` goes back