Gen-Core AI

TESSARA

User Manual

Connected assurance and governed delivery

Release baseline
Tessara v1.3.0

Audience
Business users, consultants, project teams and reporting stakeholders

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Document owner
Gen-Core AI

This manual describes the capabilities and controls present in the Tessara v1.3.0 application baseline. Availability of some actions depends on permissions and deployment configuration.

Contents

DOCUMENT USE	Use the User Manual for daily work, the Administrator Manual for platform configuration and identity operations, and the Feature List for release scope and capability review.

Document control

Field	Value
Product	Tessara
Release baseline	v1.3.0
Document status	Initial controlled issue
Purpose	Practical guidance for completing work in Tessara from first customer record through assurance, delivery and programme reporting.
Owner	Gen-Core AI
Review trigger	Material workflow, permission, navigation or release change

1. Orientation and access

Tessara is an AI-enabled business evaluation and implementation platform. It enables an organisation to evaluate how effectively its business operates against the standards, regulations, frameworks and established good practices that matter to it, and then carry the resulting improvement requirements through to implementation and delivery.

What Tessara is designed to do

The platform supports structured reviews and assessments across cybersecurity, business processes, service management, operational resilience, AI governance, data protection and other industry or organisational disciplines. It combines the selected criteria with customer responses, consultant review and supporting evidence to establish the organisation's current position.

After the reviews are complete, Tessara performs an AI-assisted criteria match. It compares the organisation's responses and evidence with the applicable requirements to identify compliance gaps, maturity gaps, inconsistencies, missing evidence, risks and opportunities for improvement. The analysis remains reviewable by an authorised person and retains its connection to the relevant standard, assessment response and evidence.

Tessara then converts the agreed findings and recommendations into a governed implementation plan. The plan contains business requirements, project-control obligations, priorities, phases, milestones, dependencies, resources and delivery activities. Every task remains linked to the requirement and assessment result that created the need for it, enabling progress to be managed through delivery, validation and final acceptance.

The defining purpose of Tessara is therefore not simply to tell an organisation where it has gaps. It provides the controlled and traceable path required to close those gaps and demonstrate the resulting business outcome.

Main area	Use it for
Dashboard	Counts, active engagements, due work and assessment progress.
Customer Hub	Companies, contacts, partners, customer history and linked work.
Engagements	Assurance engagements, selected services, standards and lifecycle gates.
Projects	Portfolio, programmes, requirements, delivery boards and project workspaces.
My Work	The signed-in user's private cross-project work view.
Reports	Gap-analysis and delivery reporting.

Main area	Use it for
Knowledge	Authoritative sources and implementation guidance.
Administration	Privileged platform configuration; visibility depends on permissions.

Signing in

Use the address provided by your administrator. Production deployments can enforce Keycloak authentication, initial password replacement and TOTP multi-factor authentication. A local Mac development deployment may use a different authentication mode. Follow the controls configured for the environment you are using.

Navigation conventions

- Use the left navigation for the major work areas.
- Use the tabs within a customer, assessment, project or programme to change views without changing the underlying record.
- Select linked references or names to drill into the source record.
- Use the portfolio-return control in project and programme workspaces to return to the relevant suite view.
- A successful save displays a confirmation message. Destructive actions request confirmation and may be blocked where linked history exists.

2. The end-to-end engagement journey

1. **Establish the relationship.** Create a company and its people in Customer Hub. Record activity and ownership.
2. **Select the evaluation scope.** Choose the services, standards, regulations or good-practice frameworks relevant to the customer and define the intended outcomes.
3. **Complete reviews and assessments.** Progress customer self-assessment and consultant assessment with evidence-supported responses and conclusions.
4. **Run the AI-assisted criteria match.** Compare responses and evidence with the selected requirements to expose gaps, inconsistencies, missing evidence and risks.
5. **Review and agree the result.** Apply human review, complete the Gap Analysis Report and record the authorised customer decision.
6. **Build the implementation plan.** Convert agreed gaps and recommendations into requirements, phases, milestones, dependencies, resources and delivery activities.
7. **Deliver and control the work.** Manage traceable tasks through project plans and Delivery Boards while monitoring RAID, resources, finance and progress.
8. **Validate and report the outcome.** Capture completion evidence, confirm acceptance and report the result at customer, project and programme level.

CORE PRINCIPLE	The same organisation and contact records follow the work. A delivery project may add delivery-specific stakeholders and contractual context, but it should retain traceability to the customer, engagement, assessment, standard, report and decision.

3. Customer Hub: companies, people and activity

Companies and contacts

Companies and contacts are separate records linked by the contact’s Company field. This supports a company with many contacts and a person with their own role, email, telephone number and contact type.

1. **Create the company.** Open Customer Hub → Companies or Partners, select Add record, enter the master data and save.
2. **Create the person.** Open Contacts, select Add record, choose the company, enter contact details and save.
3. **Maintain the relationship.** Edit the company or contact when details change. Archive records no longer in active use. Permanent deletion may be prevented by linked historical records.
4. **Open the customer record.** Select a company name to view People, Engagements, Assessments, Reports, Delivery, Evidence alerts and Activity together.

Customer tab	Information
Overview	Relationship summary, counts, account notes and recent activity.
People	Contacts linked to the company.
Engagements	Assurance work and selected product/service.
Assessments	Standard, type and progress.
Reports	Report reference, status, version and update date.
Delivery	Implementation projects linked to the customer.
Evidence alerts	Evidence requiring attention, including expiry.
Activity	Recorded relationship activity.

4. Creating and managing an engagement

Select Engagements → New engagement. The five-step wizard creates the connected engagement, paired assessments and initial work in one transaction.

Wizard step	Required decisions
1 · Customer	Use an existing customer or create a new company.
2 · Service	Select the product or service being delivered.
3 · Standards	Select one or more applicable standards or regulations.
4 · Scope & delivery	Name, owner, primary contact, partner, dates, scope, drivers and required outcomes.
5 · Review	Confirm customer → service → standards → generated work, then create.

Engagement lifecycle

Stage	Primary outcome
Mobilise	Ownership, scope and working approach established.

Stage	Primary outcome
Self-assess	Customer response and supporting information captured.
Consultant assess	Independent evidence-supported assessment completed.
Gap report	Findings, risks and remediation consolidated.
Customer decision	Authorised response to the report recorded.
Optional delivery	Approved implementation work proceeds.
Complete	Engagement lifecycle closed.

Normal advancement enforces stage gates. An authorised override requires a reason and should be exceptional. Use Edit engagement details or Edit beside Scope and drivers to maintain the record without breaking its links.

5. Paired assessments and control work

Each selected standard creates paired customer and consultant assessment records. Open an assessment from the engagement, customer record or assessment portfolio.

Assessment tab	Work performed
Overview	Position, completion and counts of evidence, findings, risks and open tasks.
Self/Consultant Assessment	Edit the relevant control response, conclusion and review status.
AI Comparison	Compare customer and consultant positions; output remains consultant-reviewable.
Controls	Review the control catalogue snapshot used by this assessment.
Evidence	Add and maintain evidence records and validity.
Findings	Record gaps and observations.
Risks	Record and manage assessment risks.
Gap Analysis Report	Compile the editable customer-facing result.
Customer Decision	Record the authorised delivery decision.

SCORING GOVERNANCE	Calculated positions and lifecycle gates are deterministic. AI may assist with comparison or narrative drafting but does not replace evidence, human review or an authorised decision.

6. Evidence, findings, risks and gap reporting

1. **Evaluate each control.** Capture the applicable customer or consultant response and conclusion.
2. **Attach or record evidence.** Use clear titles, sources, dates and expiry information so alerts and review remain meaningful.
3. **Raise findings.** Describe the gap, its basis and the required remediation.
4. **Record risks.** Use the assessment risk record where uncertainty or exposure must be governed.

5. **Review the report.** Edit narrative and remediation content, confirm the result and manage report status/version.
6. **Retain traceability.** Do not create duplicate disconnected findings or risks merely for reporting; use the linked records.

7. Customer decision and delivery creation

The customer decision is a controlled gate. Record the decision, authorised person and supporting note. If delivery is commissioned, Tessara can create an implementation project and generated activities derived from findings, risks and remediation recommendations. The generated work retains source traceability and remains editable.

8. Projects: requirements-led execution

Projects combines portfolio governance and delivery execution. A project may be generated from an approved assurance outcome or created manually. Open Projects → Portfolio and select a project.

Project tab	Purpose
Overview	Project position and connected context.
Requirements	Business requirements and project-control obligations that authorise work.
Plan & tasks	Traceable tasks, actions, deliverables, approvals and tests.
Delivery board	Kanban presentation of the same project tasks.
Milestones	Key dates and delivery outcomes.
Dependencies	Project-level dependency records.
RAID	Risks, assumptions, issues and decisions.
Team	Roles and allocation.
Financials	Budget, actual and forecast records.
Updates	Status reports and decisions required.
Reporting	Health, progress, exceptions and control coverage.

Requirements and work drivers

Every project activity must be linked to an approved work driver. Two work classes preserve the distinction between governance and implementation:

Work class	Use
Delivery Execution	Business requirements, implementation outcomes, deliverables, changes and tests.
Project Control	Reporting, governance, administration, assurance, approvals and other work needed to control the project.

1. **Create.** Open the project Requirements tab and select New requirement / work driver, or use Projects → Requirements → New requirement.
2. **Classify.** Select the work class, driver type, priority, owner and target date; write a measurable title and acceptance criteria.

3. **Approve and baseline.** Progress Draft through the permitted lifecycle. Only approved or later drivers can authorise tasks.
4. **Create the activity.** Select New traceable project activity and choose the approved driver.
5. **Complete responsibly.** Update progress, completion evidence and acceptance status. A Done card is not the same as accepted business value.

9. Delivery Board and My Work

The Delivery Board is a view of the project task records—not a separate task store. Moving a card changes the task stage everywhere. The cross-project board is inside Projects; each project also has its own board. My Work remains separate and shows the signed-in user's private/cross-project work.

- Use Backlog, Planned, In Progress, Review and Done as the standard stages unless configured otherwise.
- Edit a card to set owner, priority, due date, phase, milestone, colour, labels, progress, hours and optional notification.
- Critical, High, Medium and Low priorities have default visual colours; a manually selected card colour can override the default.
- A board column can be deleted only when it is not the final column. If it contains cards, choose a destination column before deletion.
- Use blocked state and dependencies instead of burying impediments in comments.

10. Programmes, cross-project dependencies and resources

1. **Create a programme.** Projects → Programmes → New programme. Record owner, sponsor, objectives, benefits, dates, status and health.
2. **Add projects.** Open the programme → Projects → Add existing project. Only unassigned projects are offered. A project belongs to one programme but remains independently governed.
3. **Create a dependency.** Open Dependencies → New dependency. Choose predecessor and successor projects and, if useful, their milestones.
4. **Manage shared capacity.** Open Resources. Allocations roll up from project-team assignments; totals above 100% are flagged.
5. **Report the whole.** Use Reporting for programme budget, actual, forecast, open dependencies, resource conflicts and constituent project status.

11. Reporting and Knowledge

Reporting occurs at several levels: customer history, assessment/gap report, project updates and reporting, and programme reporting. Reporting is itself a project-control obligation when it requires scheduled work; link the reporting task to an approved Project Control driver.

Knowledge contains authoritative public sources, original implementation guidance and licensing notes. Use Official source for the source material. Editable implementation guidance should be curated and should not imply ownership of third-party standards content.

12. Working practices and troubleshooting

Practice	Why it matters
Create once; link thereafter	Prevents duplicate companies, contacts, findings, risks and tasks.
Baseline before execution	Keeps tasks tied to approved business or control intent.

Practice	Why it matters
Use acceptance evidence	Demonstrates delivered value, not just completed activity.
Maintain owners and dates	Makes dashboard, notifications and reporting reliable.
Use lifecycle actions	Preserves an auditable journey instead of editing status informally.
Archive before deletion	Retains history; deletion can be blocked where links exist.

When something does not work

- Refresh the view and confirm the save confirmation appeared.
- Confirm the record is active and that filters are not hiding it.
- If a task cannot be created, approve or baseline a matching work driver first.
- If a project cannot be added to a programme, check whether it already belongs to another programme.
- If a column cannot be deleted, confirm it is not the last column and select a destination for existing cards.
- For access, MFA, integration or environment issues, contact the platform administrator and provide the action, time, user and visible error message.