

Resolver CORE Administrator's Guide

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Version 2.4.2 (Hotfix) Release Notes

Improvements

- Australia (AU) is now a supported region for data storage.
- Added a time limit for formula calculation run times. If the calculation fails after the allotted time, an error message is displayed and an administrator should check the formula's settings to rectify any issues.

Bug Fixes

- Fixed an issue that prevented users from accessing Core or opening links from emails when SSO is enabled.
- Corrected a problem that prevented some users from creating new objects.

Version 2.4 Release Notes

See the [Version 2.4 Feature Overview Video](#) article for a video introduction to some of these new features.

New Features

Assessment Management

A number of new features make it easier to manage assessments, including the ability to:

- Delete unused data definitions;
- Modify any fields currently used in an assessment;
- Select a new data definition for an unlaunched assessment;
- [Delete a launched assessment type](#) and all its data; and
- [Delete an individual assessment object](#) and its instances (evaluations).

Note that only administrators with Delete permissions enabled on the assessment type can delete launched assessments and assessment objects.

Email Daily Digest

The [Messaging action](#) on a workflow now offers a nightly delivery frequency to queue all the email notifications a user would receive for the transition in a single email. If the same role and email template are selected for additional Messaging actions, users will receive one email with a consolidated list of all the objects that require their attention, even if they're from multiple object types. For added convenience, admins also have the option to include a link in the email to the user's homepage (My Tasks or starred reports).



Hi 

Our quarterly CSA launched today. As a Control Owner you are expected to login and update the control you own. Please ensure you have completed this task by 2018-10-09. As the due date approaches, reminders will be sent out. If you have any questions, please contact: Sarah.Barkley@Companyname.com

Your Controls are listed below or you can access a report via the homepage link at the bottom of the email.

Click the links below to access

[Travel and entertainment expenses are audited or reviewed on a sample basis.](#)

[The entity's privacy policies address the disclosure of personal information to third parties.](#)

[Preferred provider agreements are in place to obtain lowest travel rates.](#)

Click the link below to access

[Your Homepage](#)

Powered by  **RESOLVER**

You received this email because your company has subscribed to Resolver

Workflow State Variables

Administrators can use workflow states as relationship/reference variables in conditions or formulas. Depending on the [sub-type](#) selected, these variables will check if some or all of the objects are in the specified state or provide a count of the objects in that state.

VARIABLES

Variable Type

Relationship

Relationship

Controls

Available Components

Select one...

SUM (Review Comments)FORMULA

Significant DeficienciesFORMULA

DraftSTATECONTROL STATUS

ActiveSTATECONTROL STATUS

ArchivedSTATECONTROL STATUS

Self AssessmentSTATECOMPLIANCE CSA WORKFLOW

Compliance Team ReviewSTATECOMPLIANCE CSA WORKFLOW

RemediationSTATECOMPLIANCE CSA WORKFLOW

CANCEL

✓ CREATE

Identify Form Conflicts & Set a Priority

When a user belongs to two or more roles that have permission to view the same object, Core will automatically display the most recently created standard form for that object, which could create a [form conflict](#) . Now, using the Impersonate feature, administrators can navigate to a particular form to check if a conflict exists.

© Resolver Inc.

11

TURN OFF IMPERSONATION MODE

Impersonation mode: On

Impersonating: Caroline Sorensen

RESOLVER

+

Q

ooo

?

U

Risk Management

Identify Risks

Assess & Treat

Monitor & Review

...

Uh oh, this form is in conflict. Adjust the priority in the configurable form builder

...

X

Create Risk

Create a New Risk

Risk Name

Description

Processes

Search

+

Risk Sub Category

Search

+

If a form conflict does exist, a number can be entered into the new Priority field when editing the form, so that the form with the higher assigned priority is displayed to the user.

Admin : Edit Configurable Form

Business Unit - Edit



Name

Business Unit - Edit

Description

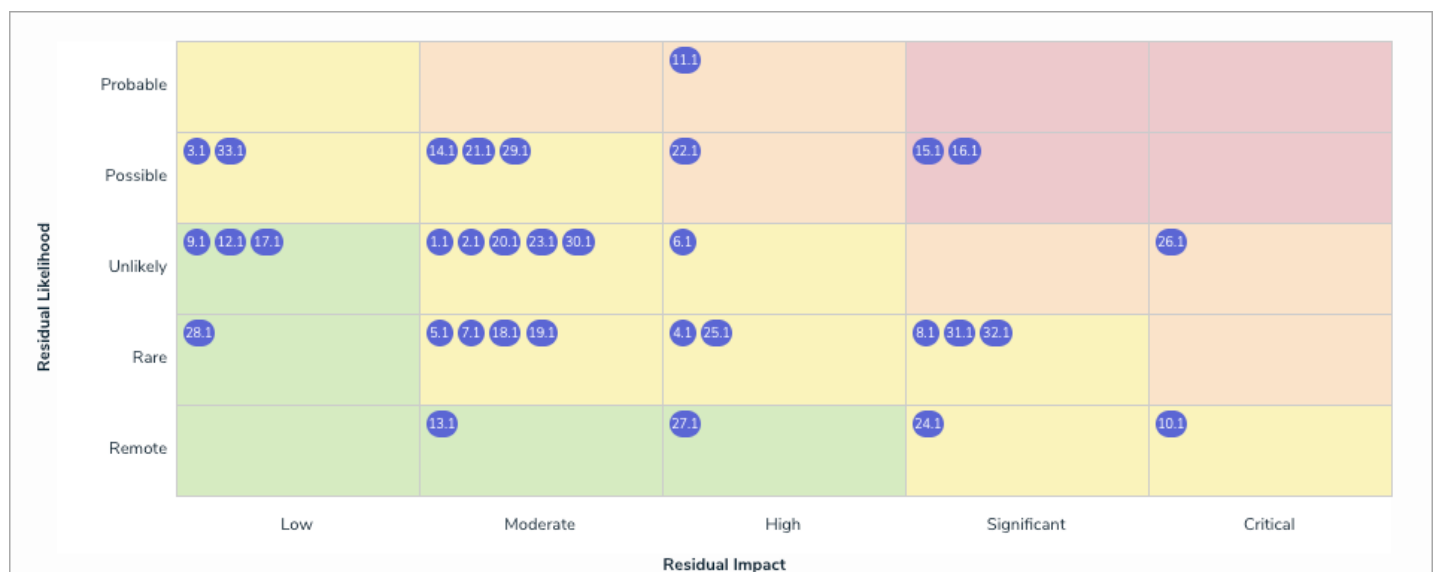
Priority

0

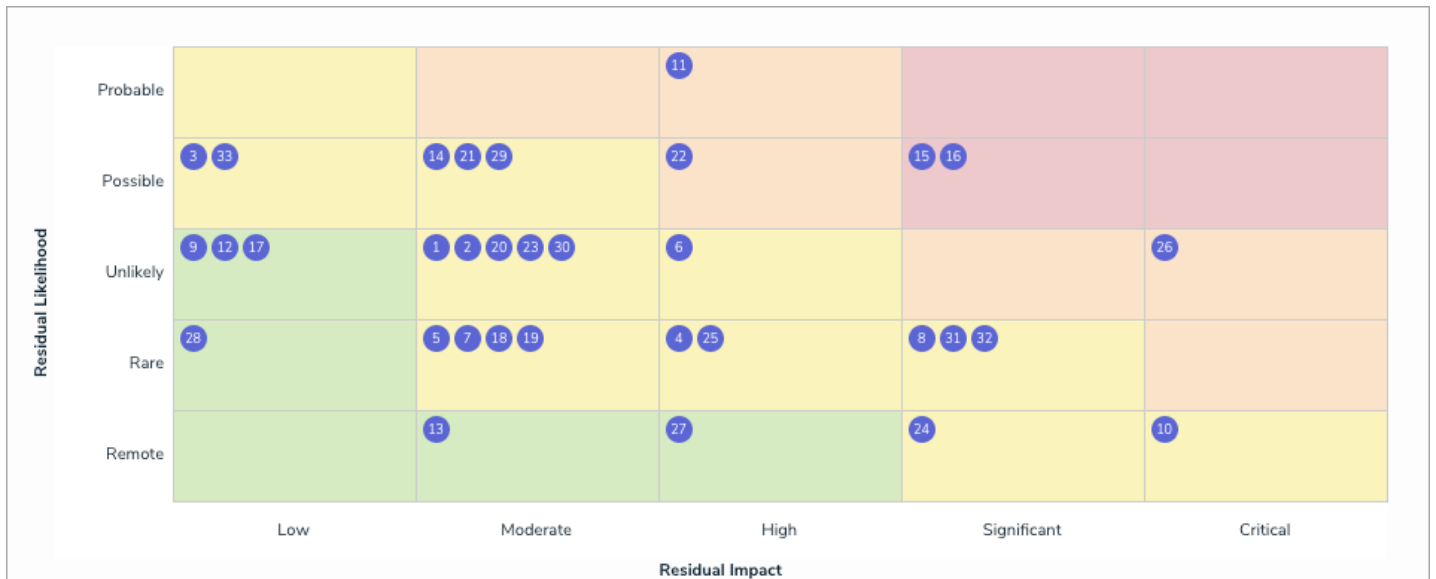
Where does this form rank in relation to other forms for this object type if multiple forms conflict (1 being lowest)?

Heat Map Display

Two new options in the [heat map](#) settings allow administrators to show or hide decimals for assessment objects as well as the field or formula names selected for the X and Y axes.



A heat map with decimals displayed.



A heat map with the decimals hidden.

UI Improvements

The user interface for objects displayed in search results, the assessment scoping screen, and the advanced relationship/reference palette have been streamlined with a more intuitive design. This includes hiding references to assessments if no assessment data exist, automatically displaying existing objects that can be added to a relationship or reference through the palette, and displaying a message when a search yields no results.

C-10.4 Risk assessment efforts are subject to review

Risk assessment efforts are subject to review and approval by key business stakeholders.

PAST ASSESSMENTS ▾

Indicator [GO TO DETAILED RESULTS](#)

IND-16 Privacy Failure Index

No of customers PII at risk in last 12 months / total number of customers

Library **DRAFT**

PAST ASSESSMENTS ▾

IND-16.4 Risk and Control Self Assessment 2018 - Q1 LONDON **NOT STARTED**

IND-16.3.1 Risk and Control Self Assessment 2018 - Q1 LONDON **NOT STARTED**

IND-16.2.1 Risk and Control Self Assessment 2018 - Q1 LONDON **NOT STARTED**

IND-16.1.1 Risk and Control Self Assessment 2018 - Q1 LONDON **NOT STARTED**

IND-16.3 Risk and Control Self Assessment 2018 - Q1 SHARED SERVICES **NOT STARTED**

LOAD MORE

Search results before version 2.4.

Risk

[GO TO DETAILED RESULTS](#)

R-1

Loss of customer confidence

Inability to recover critical processes within stated objectives; loss of stakeholder or investor confidence

ASSESSMENTS

Control

[GO TO DETAILED RESULTS](#)

C-1

Customer evaluation assessments

ASSESSMENTS

C-2

Formal customer feedback process

ASSESSMENTS

R& C Self Assessment	2018 - Q2	TORONTO	SELF ASSESSMENT
R& C Self Assessment	2018 - Q2	TORONTO	SELF ASSESSMENT
R& C Self Assessment	2018 - Q2	TORONTO	SELF ASSESSMENT
R& C Self Assessment	EDMONTON	2018 - Q3	SELF ASSESSMENT
R& C Self Assessment	2018 - Q2	TORONTO	SELF ASSESSMENT

LOAD MORE

Search results after version 2.4.

Data Region Identification

The login screen and help icon in the top bar now displays the country where your organization's data is being stored.

Miscellaneous Improvements

- Made design and wording improvements to the email templates.
- Adjusted the colors on heat map reports for better readability.
- You can now view the unique IDs for assessment instances by hovering your cursor over an ellipsis in the search results, the scoping screen, and relationship palette.
- Object Type External Reference ID is now the default Identifier Type when using Data Import.

Bug Fixes

- Improved report loading time when retrieving formula and assessment data.

- Fixed a bug that caused database connection issues when recalculating a large number of formulas.
- There is longer a lag when typing data into a large form in Internet Explorer.
- Fixed an issue that would occasionally prevent inferred permissions from being saved.
- Creating an object after converting a single select list to a multi-select list no longer produces an error.
- Deleted relationship objects no longer continue to appear in a related object's table.
- The pop-up calendar now shows 31 days for the month of March instead of 30.
- Fixed an issue that sometimes caused Data Analytics reports to fail upon export.
- Table columns no longer disappear when applying report filters.
- Fixed a bug that sometimes prevented a heat map from regenerating.
- Parameters are no longer deleted when a report page is reloaded.
- Fixed an issue that produced inconsistent or incorrect search results when using the Search field in an activity.
- Objects added to relationships on assessment forms are no longer removed after refreshing your browser.
- Fixed an issue that prevented an object from transitioning out of the Creation state after removing values from a required field.
- Duplicate assignees no longer appear in report tables.
- Data Import no longer produces an error when attempting to import a role with a user that belongs to a user group.

Version 2.3.5 (Hotfix) Release Notes

This release includes an improvement to formulas with a new option for administrators to choose if the system should treat a blank variable as null so it's omitted from the calculation. Previously, all blank variables were assigned a zero (0), which could produce unexpected results, depending on the formula. See the [Null Values in Formulas](#) article for more information.

Version 2.3.3 (Hotfix) Release Notes

This hotfix release includes improvements and bug fixes.

Improvements

- Formulas and workflow conditions now treat blank field values as 0. This applies to the array, count, average, and sum formula sub-types.
- Clicking an Export button will now display a "Loading..." message to indicate the download will begin shortly. This applies to:
 - Org Manager;
 - Data Import;
 - Audit Trail; and
 - Languages.

Bug Fixes

- Attempting to edit an assessment workflow from the Edit Assessment page no longer displays a blank page.
- Custom logos on email templates now display in the correct size when viewing emails on Microsoft Outlook.
- Fixed an issue that prevented related objects from appearing in the Relationship column of table reports.
- Exporting a large report to Excel or Word no longer produces a 500 error.

Version 2.3 Release Notes

New Features

Embedded Fields

Email templates now support [field and property variables](#) , making it easy to provide important information about an object when users receive emails through the Messaging action. These variables are populated based on the object(s) that triggered the email.

A new risk is created by Default User

 **Resolver Notifications** <noreply@resolver.com>
Monday, July 23, 2018 at 1:17 PM
[Show Details](#)

RESOLVER

Hi 

The following risk has been created:

Date Created: **2018-07-23 17:16 (UTC)**
Severity: **High**
Risk Name: **Breach of data**

Please, follow the link below to review the risk.

Click the link below to access
[Breach of data](#)

Powered by **RESOLVER**
You received this email because your company has subscribed to Resolver Core

Email variables (highlighted) as they appear to end users in an email.

Data Import Template

Instead of entering data manually into a spreadsheet, a [data import template](#) can now be generated from the settings for some or all of the relationships and object types in your organization. This template is populated with the basic data required to complete the import, including Object Type and Relationship IDs, fields' Unique Names, assignable roles, and workflow states.

	A	B	C	D	E	F	G	H
1	Object Type ID							
2	CorrectiveAction							
3				Actual Action Completion Date	Expected Action Completion Date	Assignable Role	Library Workflow	
4	External Ref ID	Name	Description	ACTIONCOMP	EXPECTEDCO	Corrective Action Own	Corrective Action Status	
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								

Bug Fixes

- Fixed an issue that prevented required fields from validating on assessment objects with multiple workflows.
- Formula recalculations now display correctly on forms accessed through the Open a Form action.
- Fixed an issue that prevented the 0 digit from appearing in reports that displayed imported object data.
- Recalculated formulas no longer display an error when select list options are removed.
- Fixed an issue that would prevent email notifications from being sent when an object is created.
- Fixed an issue that sometimes caused a connection error to appear upon login.
- General email notification and Org Import bug fixes.

Version 2.2.1 (Hotfix) Release Notes

This hotfix release includes a number of performance enhancements to improve your overall experience in Resolver Core. These enhancements include:

- New variable sub-types to improve formula processing.
 - Variables can now be made to contain the actual Array (default for current formulas), Count, Every, Average, Max, and Min values of a relationship or reference field (instead of representing the list of values). This means that formula variables can be used to collect and hold information, thereby greatly improving performance when formulas are recalculated.
- Other general performance improvements for:
 - Reports
 - Search
 - Scope & Launch
 - Object creation

Version 2.2 Release Notes

New Features

Starred Reports

It's now possible to star reports so they appear as tabs on your homepage, allowing you to quickly access important information that's relevant to you. A starred report can even be flagged as your landing page so it's the first thing you see when you log in. See the [New in 2.2: Starred Reports](#) article to watch a short orientation video.

RESOLVER

Home

My Tasks

Key Risk Indicators by Risk Category

Risk and Control Matrix By Process

RM - Risk and Control Matrix By Process

O-1.16

Retain High-Quality Employees

Search Table...

Risks Unique ID	Risks Name	Risk Owner	Risks External Reference Id	Inherent Risk Score	Residual Risk Score	Controls Unique ID	Controls Name	Key Control	Design Effectiveness	Operating Effectiveness
R-3.18	Lack of social events		RISK-3.18	Medium	High	C-6.18	Control 1	Not-Key	Not Effective	Effective
R-2.17	Not properly on boarding new employees		RISK-2.17	Critical	Significant	C-8.17	Control 8			

My Tasks Tab

The My Tasks page is now accessible through a tab on the homepage and appears beside any starred report tabs.

Email Templates

Tailor the emails sent to users during a [Messaging](#) workflow action with the new [Email Templates](#) settings, where you can add custom subject lines and messages, apply basic formatting, and even include your company logo.

Email Templates: Create an Email Template

Email Template Name

Report Required Template

Make sure to select a name for your template that does not exist.

Email Subject Line ?

Report required

Email Body ?

The following object(s) require a follow-up report.

Basic Markdown Formatting

HEADERS	EMPHASIS	LISTS	
# h1	<i>*italic*</i>	<u>Unordered</u>	<u>Ordered</u>
## h2	**bold**	-Item 1	1. Red
	---strikethrough---	-Item 2	2. Green
		-Item 3	3. Blue



Hello {User}

The following object(s) require a follow-up report.

Click the link below to access:

[Object name](#)

[Object name](#)

Powered by  **RESOLVER**

You received this email because your company has subscribed to Resolver Core

Heat Map Colors

Additional colors are available for [heat map](#) reports. Clicking a cell when configuring the report lets you choose from light to dark shades of green, yellow, orange, and red.

CONFIGURE COLORS

Select the data you want to visualize in the table

[Regenerate Heat Map](#)

Critical					
Significant					
High					
Moderate					
Low					
	Remote	Rare	Unlikely	Possible	Probable

Role Parameters on Reports

Administrators can apply the By Role [parameter](#) on reports, which controls the data displayed in the report and all its elements. More parameters will be available in future releases.

Assign Roles & States on Imported Objects

Administrators can now assign roles and workflow states when [importing objects](#) .

Printing Improvements

Larger tables and images no longer appear cut off in printed forms or reports, headers no longer appear alone on separate pages, and table headers are repeated when a table spans more than one page.

Miscellaneous

General performance improvements.

New in 2.2: Starred Reports

Get quick and easy access to important reports by adding them as tabs on your homepage. Simply click the  icon from the report's page, click **Add to Home** and you're done! Check out the video below for a quick orientation on how to use this awesome new feature.

Your browser does not support HTML5 video.

Version 2.1.3 (Hotfix) Release Notes

Bug Fixes

- Fixed an issue that would prevent report and navigation form data from displaying after an object type was deleted.

Version 2.1 Release Notes

Overview

Resolver Core 2.1 introduces new features that make your experience even more seamless. With two new report filters, end users can now filter data by object type or role, while a new parameter on the table element in reports allows administrators to create personalized reports for the currently logged in user (e.g. My Risks or My Incidents). Other features include a new workflow action to automatically set select list options on an object, the ability to load and explore all objects that belong to a particular object type instead of searching by keyword, and improved orchestration performance.

New Features

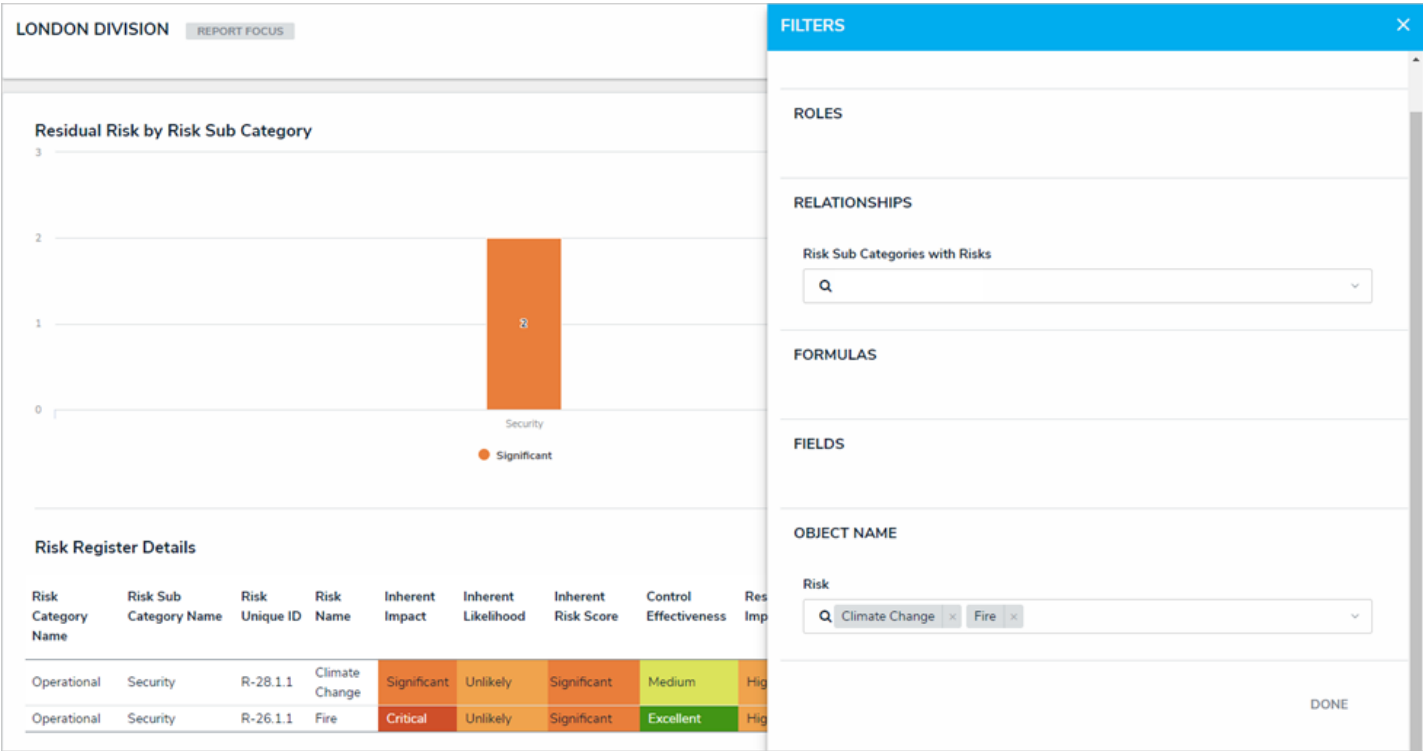
Quick Search (Explore By)

You can now [search](#) your organization by object type by clicking the  icon in search field on any page, which will reveal the **Explore By** menu. From here, you can click an object type to reveal its objects and apply filters to further narrow the results. These results are displayed based on the current user's permissions.

Report Filters

[New filter options](#) have been added to reports, including:

- **Object Type (Object Name):** Users can filter by object name to display data from one or more selected objects only.
- **Roles:** Users can filter report data by individual users or user groups in explicit roles that have been granted direct access to objects from the report's data definition, making it easy to view and analyze data that's relevant to a particular user.



Object type filters applied to a report, which narrows down report data based on the object(s) selected in the filter.

Current User Parameter on Table Reports

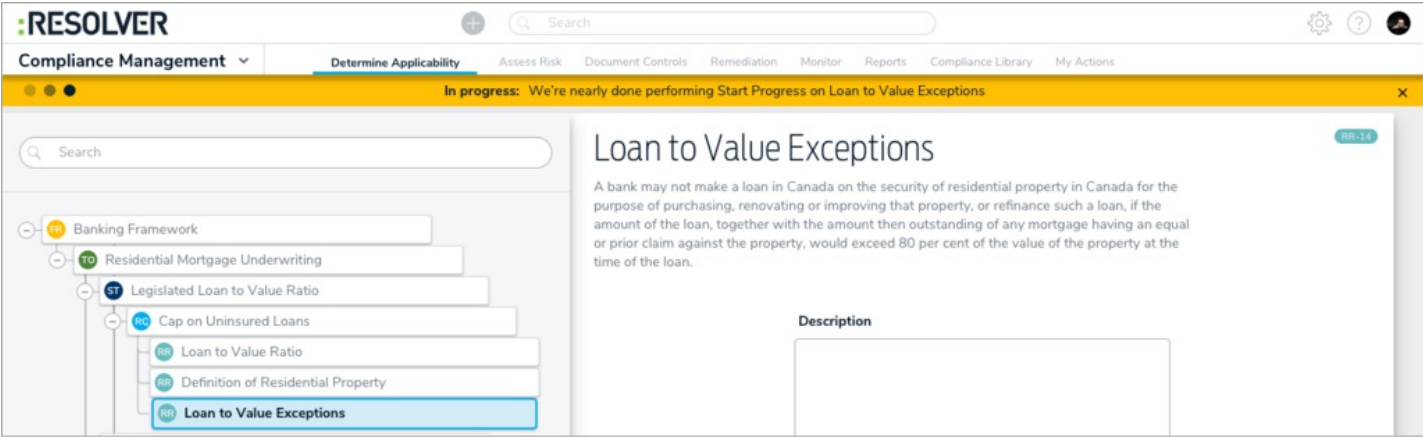
Administrators can apply the new **Current User** parameter on [tables](#) to create personalized reports. Only users added to the role selected in this parameter can view data in the table.

Select List Workflow Action

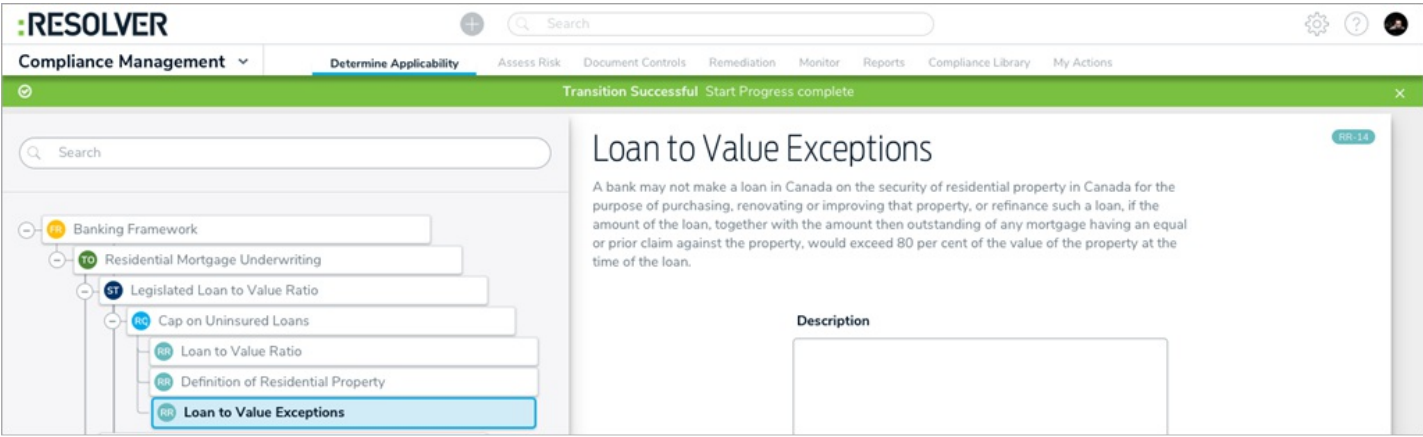
Administrators can now use the [Set Field Value](#) action on a workflow transition to dynamically update select lists once an object transitions into another state. For example, this action could be used to select a High Priority option when an Incident object moves from the Open to Escalated state.

Orchestration Event Improvements

Improved the performance of the [Orchestration Event](#) action on a workflow transition, including faster execution for large amounts of data and visual cues to indicate orchestration progress.



A banner indicating that an orchestration event is in progress.



A banner indicating that an orchestration event was successful.

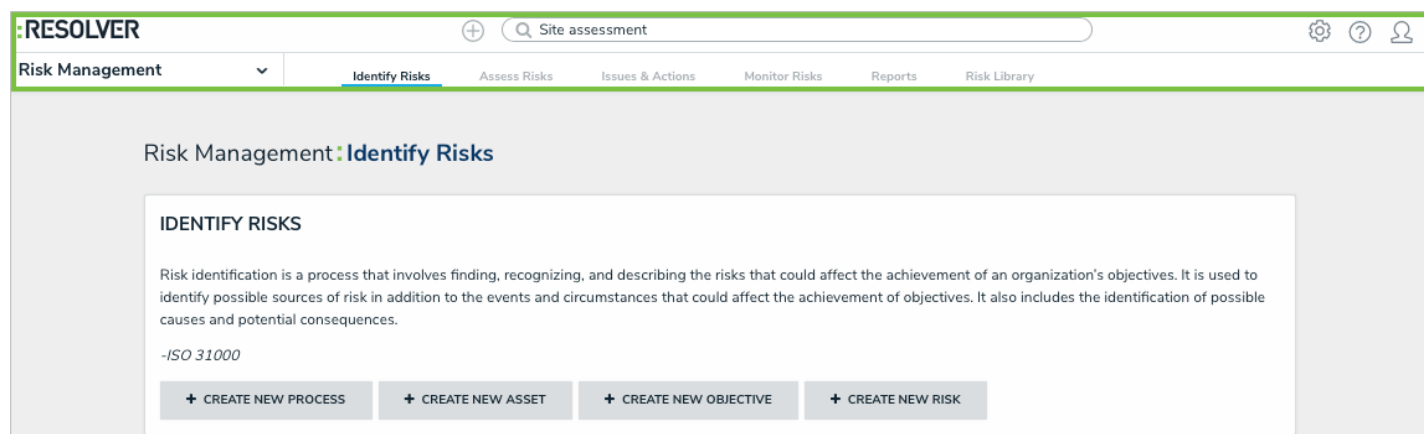
Resolver Core 2.0 Feature Overview

This article provides an overview of the major features available in Resolver Core 2.0, which is expected to be released near the end of January, 2018.

User Interface: New Navigation

The new user interface offers a refined hierarchical, top-down structure in its navigation, providing contextual information that helps the user understand not only where they are in an app, but which task or function they should be completing.

By replacing the left navigation menu with a top navigation bar that includes both dropdown menus and tabs, valuable screen space is freed up while simultaneously providing more application/activity-related information as users move around an app.



The new app navigation in version 2.0 (highlighted).

For more detailed information on the new user interface, watch the Resolver Core 2.0 New UI Orientation video below.

Assessments

Assessments are a key building block to Resolver Core as they support multiple business activities across most of the apps.

Broadly speaking, an assessment is a point-in-time or continuous evaluation of data in the context of a business activity. Some assessment examples include:

- Risk assessments
- Control assessments
- Control testing
- Security audits
- Audits
- A/B testing
- Scenario modeling

Note: Not all the examples listed above are supported in 2.0.

Additional Data Types

The 2.0 release introduces the concept of reference data, which helps the user understand how the assessed data relates to the bigger picture across the organization. Reference data is important, secondary information within an assessment that does not actually need to be assessed. Potential examples of data that can be used as a reference include:

- Legislations
- Business units
- Locations
- Departments
- Products
- Teams
- Major processes
- Objectives

When an object in an assessment is flagged as reference data, it prevents additional instances of that object from being created at the launch of an assessment, avoiding data bloat while providing better organization of the data.

Assessment Scoping

Users can search, explore, and refine assessment data via the new scoping tool. The ability to explore permissioned data will contribute to more efficiently scoped assessments, draw connections between data across an organization so testing can be done in sync, and easily include past data from previous assessments (e.g. relaunch from a previous quarter, leverage other team's conclusions).

RESOLVER

+

Search

⚙️

?

👤

Risk Management

Identify Risks

Assess Risks

Issues and Actions

Monitor Risks

Reports

Risk Library

QUARTERLY RISK ASSESSMENT

Q3 2017

Toronto

EDIT ASSESSMENT DETAILS

Add a focus Process to your assessment from the list below. If it's necessary, you can add multiple Processes to focus on. You'll be able to review and perform more granular scoping before you confirm the scope of your assessment.

Filters applied

Location

Toronto

×

Filter Processes

By Name

Q

▼

By Assessment Type

Q

▼

Dimension Type

Q Location

▼

Q Toronto

▼

By Description

Q

By Workflow State

Q

By Risk Rating

Q

By Inherent Risk

Q

By Residual Risk

Q

P-1

Bank Account Management and Reconciliation

Bank Account Management and Reconciliation

Library

In Progress

PAST ASSESSMENTS

^

Quarterly Risk Assessment

Q2 2017

Toronto

Complete

+

ADD TO SCOPE

Quarterly Risk Assessment

Q1 2017

Toronto

Complete

+

ADD TO SCOPE

CSA

2017

Toronto

Complete

+

ADD TO SCOPE

P-2

Cash Management, Treasury, Cash Disbursement (Incl Cash flow, Reconciliation)

Cash Management, Treasury, Cash Disbursement (Incl Cash flow, Reconciliation)

Library

In Progress

PAST ASSESSMENTS

▼

Not Available

P-3

Debt and Interest Expense/Manage Cash Flow/Treasury

Debt and Interest Expense/Manage Cash Flow/Treasury

Library

In Progress

PAST ASSESSMENTS

▼

+

ADD TO SCOPE

P-4

Foreign Exchange Risk (Hedging and Currency Translation)

Foreign Exchange Risk (Hedging and Currency Translation)

Library

In Progress

PAST ASSESSMENTS

▼

+

ADD TO SCOPE

There are currently 0 objects added and ready for review

▲

An assessment displaying the new scoping capability.

Intuitive Display

Understanding data is critical. Users need the visibility of data across the organization in its current state but also need to understand how that data has been changing over time and across business units. Did this control fail last quarter? How has that risk trended over time? Why? These are just some of the question we need to be answered to accurately make conclusions on the current state.

To do this, 2.0 has introduced the ability to access previous assessment results via fields while assessing objects. This enables all user types to make more confident and accurate conclusions.

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Control Assessment

A control self assessment allows the compliance team to understand how the controls limit the organization's overall risk exposure. Please assess how well the control is operating within daily operations.

Control self assessment

Weak

Time	Location	Control self	Trending
Q4 2017	Toronto	Weak	—
Q3 2017	Toronto	Weak	↓
Q2 2017	Toronto	Strong	—
Q1 2017	Toronto	Strong	—
Q1 2016	Toronto	Strong	—

Viewing previous assessment results of an object field via a form.

Additionally, intuitive grouping of assessment instances by the originating assessment in search, scoping, and relationships mean that it's easier to visualize how objects change over time and map the correct instance to applicable objects.

Description

Maecenas magna phasellus mattis dui dui leo mi auctor accumsan nostra aliquam condimentum arcu magnis himenaeos ridiculus r

Number of Requirements

3

Rationale for Not Applicable

Sub Topic Status

Applicability As

Related Data

Requirements

Unique ID	Name	Inherent Impact	Type of non-compliance
Req-1	Requirement 1	High	Loss of License
Req-2	Requirement 2	Significant	Financial Penalty
Req-3	Requirement 3	High	Reputation Damage

ADD EXISTING REQUIREMENT
CREATE NEW REQUIREMENT

Search

R-4 Requirement 4

Manage Cash Flow/Treasury Risk and Control Matrix

Library

In Progress

+ ADD

PAST ASSESSMENTS

CSA Q2 2017 Toronto Archived

CSA Q1 2017 Toronto Archived

Sox Q3 2017 Toronto Archived

Sox Q2 2017 Toronto Archived

Sox Q1 2017 Toronto Archived

ADDED

+ ADD

+ ADD

+ ADD

+ ADD

R-5 Requirement 5

Manage Cash Flow/Internal Store Policy

Library

In Progress

+ ADD

PAST ASSESSMENTS

R-6 Requirement 6

Manage Cash Flow/Bank to Offshore Accounts

Library

In Progress

+ ADD

PAST ASSESSMENTS

R-4 Requirement 4

Manage Cash Flow/Treasury Risk and Control Matrix

Library

In Progress

+ ADD

PAST ASSESSMENTS

R-6 Requirement6

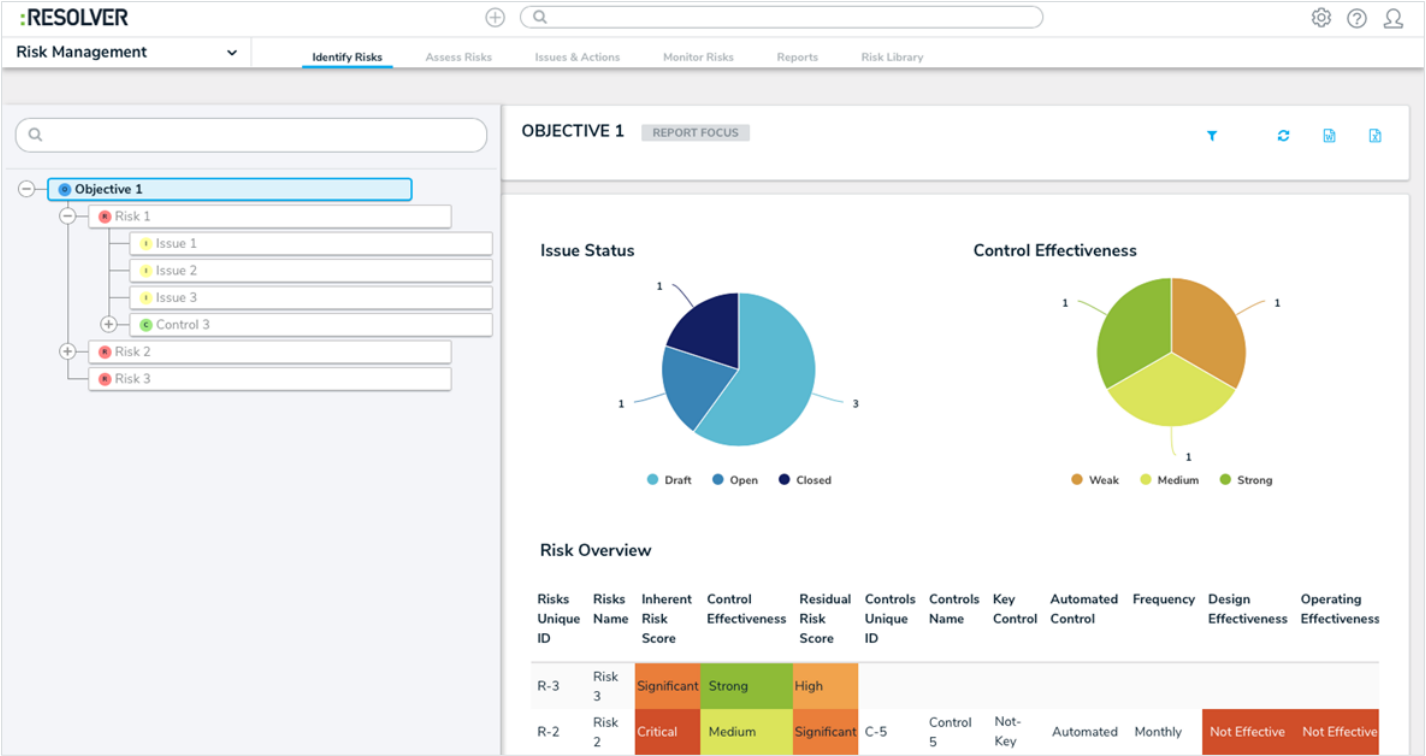
Manage Cash Flow/Chain of custody

Adding existing, un-mapped requirements to a topic or sub-topic.

Navigation Form (Tree Browsing)

In previous versions, users didn't always understand where they were, which objects are related to another, or how to access these related or referenced objects. The new navigation form corrects these issues.

Organizations tend to think of their data in a hierarchical structure and with the navigation form, you can now connect your highly configurable forms or reports to any object. The tree provides context by representing the data in a structure that's both familiar and easily accessible.



The navigation form on the left. Clicking on an object in the form will display it to the right.

Assessment Workflows

Although the properties and fields of an object (e.g. risk, control, or incident) may be similar, the process these objects go through are typically dependent on the application (e.g. a risk in Security Audit versus ERM) or the assessment (an audit assessment versus a risk assessment). For example, SOX assessments focus on controls and require an extended life cycle that potentially differs from an audit assessment, it requires more coordination and involvement from multiple resources.

Assessment workflows enable this flexibility by allowing administrators to tailor an object's workflow at the assessment level, allowing you to create different workflows for the same objects across multiple applications and assessments.

RISK**WORKFLOW**

Risk Assessment Risk Workflow

Quarterly Control Assessment Risk Workflow

Risk Library Workflow

An object type with multiple workflows.

Workflows

Orchestration

Orchestration enables communication between objects. Objects can “talk” to and “instruct” each other, which dictates behaviors based on actions or assessments taken on another object. In other words, using orchestration, changes to one object can force a change to a related object. Events that could benefit from orchestration include:

- Kickoffs
- Escalations
- Close Audits
- Launch a Risk Assessment
- Launch a Control Assessment

More specific examples include:

- Close an Audit: Clicking the Close button at the audit level closes all open issues and marks all tests as Complete.
- Launch a Risk Assessment: Sets all processes, risks, and controls from Draft to In Progress. All objects transition, the objects are time stamped with start dates (a new workflow action feature), and emails are sent to the appropriate owners.

Workflow Actions

Expanding on the above, the new workflow actions add another level of automation to an organization's processes, providing less hands-on work and more standardization of data changes.

These new actions include:

- Clear Fields, Role, or Relationships (e.g. clear roles when launching an audit. Clear fields, issues, and action plans when reassessing controls, risks, or processes).
- Set Date fields (e.g. extension requests or time stamping start or completion dates). As assessments progress, dates need to be responsive as the objects move through different stages. Workflow date actions will enable:
 - Time stamps (e.g. the start or completion of an assessment).
 - Deadline setting (set a date two weeks from today).
 - Extension deadline (e.g. request extension. If approved, reset the deadline date today, but add 5 additional days).

State Categories

State categories will help users understand completion percentages and segregate data across the applications. For example, Library versus Assessment versus Archived data.

This feature will continue to evolve in future releases. More to come...

Additional Features

Filters

Date-based filters can now be applied to reports. This feature is useful for situations such as running reports on issues created in the last month or action plans that have been opened in the last week.

Field Type: URLs

The URL field type on forms enables users to upload files, files and links, or links only.

The screenshot shows a web form titled "Risk Library Workflow". Below the title is a teal header bar labeled "Risk Assessment". Underneath, the "Attachments." section displays two items: "Risk Assessment Procedure.xlsx" with a file icon and "Iso31000" with a link icon. Each item has a small edit icon and a close 'x' icon. Below the attachments is a large dashed rectangular box containing the text "Drag files here or click to select..." and "or" followed by "Click to add a web link to a file..."

The new URL field on a configurable form.

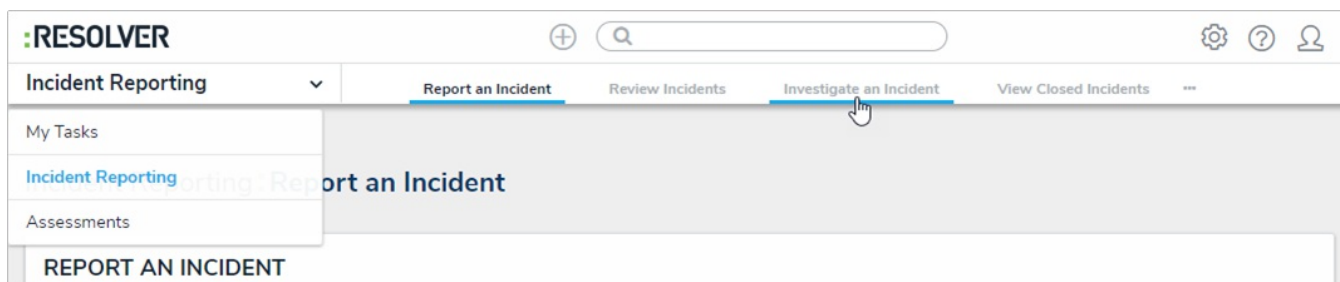
Version 2.0 Release Notes

New Features

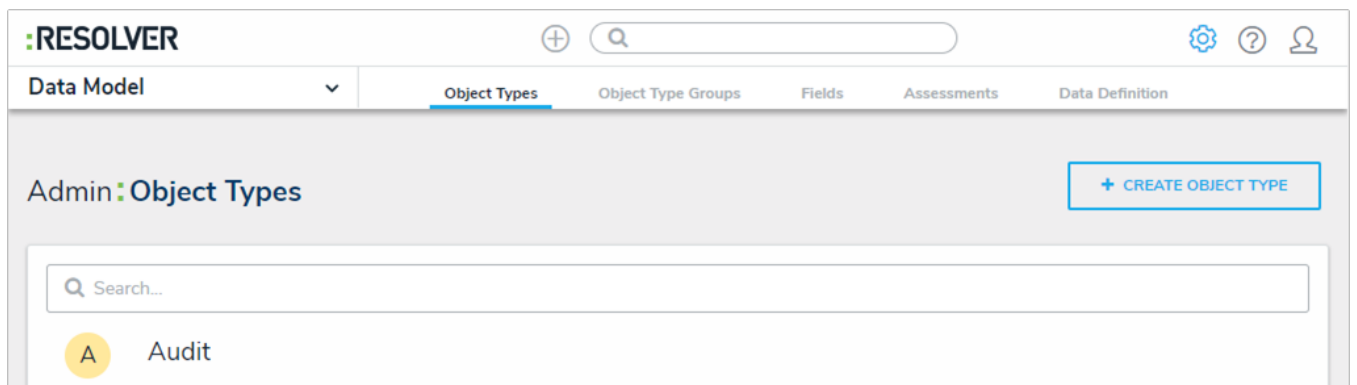
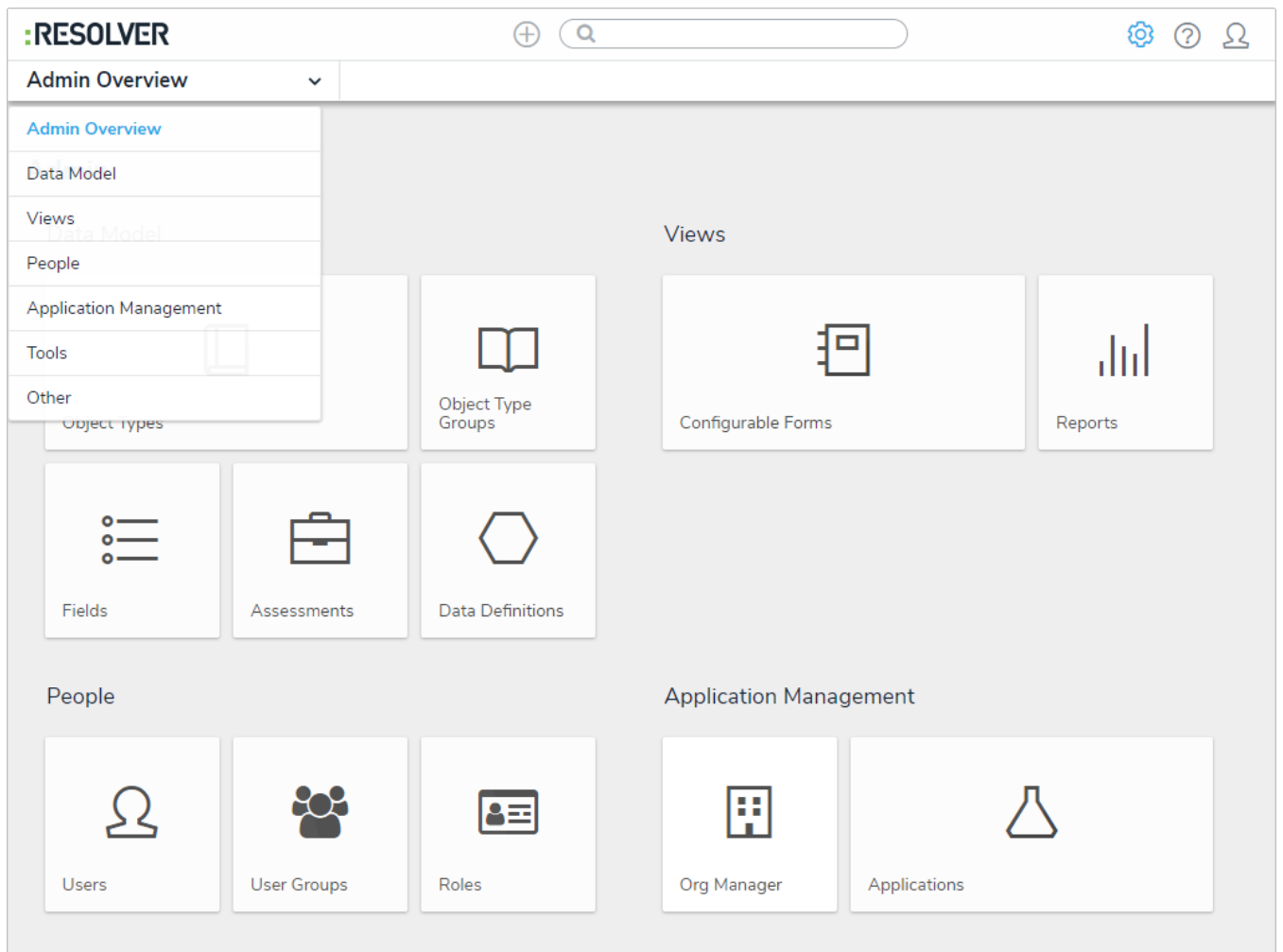
User Interface

Core 2.0 comes with a brand-new user interface that helps guide users and free up valuable screen space. These changes include:

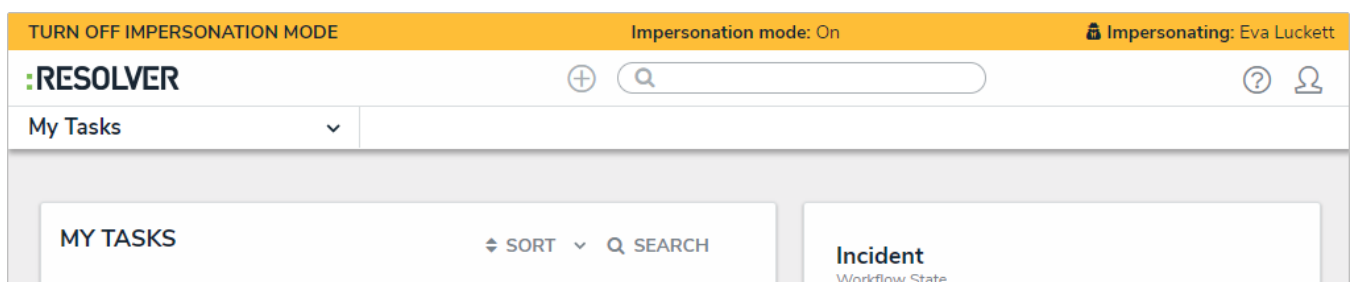
- The new static top bar that gives you access to:
 - The home (My Tasks) page by clicking the Resolver or custom logo;
 - Quick Create by clicking the  icon;
 - The search function by entering keywords in the text field;
 - The administrative settings by clicking the  icon (if you're not an admin, this icon is not visible);
 - The Resolver Knowledge Base, Terms of Service, the Resolver Support site, and current version number by clicking the  icon; and
 - The name of the currently logged in user, the My Tasks page, and the logout function by clicking the  icon.
- Through the new navigation bar (nav bar), the homepage (My Tasks) and any applications you have permission to view are available through a dropdown menu. Once an application is selected, you can quickly move through activities using the new tabs.



- When working in any of the administrative settings, the nav bar dropdown menu provides a link to the Admin page (Admin Overview) as well as the groups of the settings available (Data Model, Views, People, Application Management, Tools, and Other). When an individual setting or group is selected, the other settings in that group are available through tabs. To return to the home page, click the Resolver or custom logo.



- A refined design for Impersonation Mode that aligns with the new UI.



Assessment Workflows

Because an assessment object’s process often differs by each application (e.g. Audit versus ERM), administrators can now tailor the workflows of dimension object types, allowing you to configure or create new workflows for the same objects types across multiple applications and assessments. These settings are available from the Workflow tab on the Edit Assessment page.

Assessment Reference Data

When an object in an assessment is flagged as reference data, it prevents additional instances of that object from being created at the launch of an assessment, avoiding data bloat while providing better organization of the data. Examples of reference data includes legislation, business units, locations, products, or objectives. Object types are flagged in assessments by toggling them on or off in the new Workflow settings of the assessment. When toggled off, you can display the assessment object through the Reference element on a configurable form.

OverviewWorkflowFields (0)Formulas (1)Relationships (2)References (1)Roles (0)

Object TypeAssessment Data

Control Assessment (Assessment)

Process (Focus)

Control and location

Quarterly Control Assessment 2

When toggled on, assessment data means that new assessment instances will be created for each object of that object type, whereas when it is toggled off it only shows a reference to the Library object.

Process (Library)

Control and location (Library)

Quarterly Control Assessment (Library)

CONFIGURE

CONFIGURE

NEW

Intuitive Grouping

The intuitive grouping of assessment instances by the originating assessment in search, scoping, and relationships help users visualize how objects change over time.

RESOLVER

Retain

Applications

ExploreSearch Results

Current Search Parameters: Object Types: Risk; Keywords: Retain

Back to Grouped Results

Filters

By Name

By Assessment Type

By Dimension

R-17 INABILITY TO RETAIN TALENT

Library RISK ASSESSMENT

PAST ASSESSMENTS

R-17.1 Risk and Control Self Assessment2018 - Q1BUSINESS UNIT 1RISK ASSESSMENT

R-17.4 Risk and Control Self Assessment2018 - Q4BUSINESS UNIT 1NOT STARTED

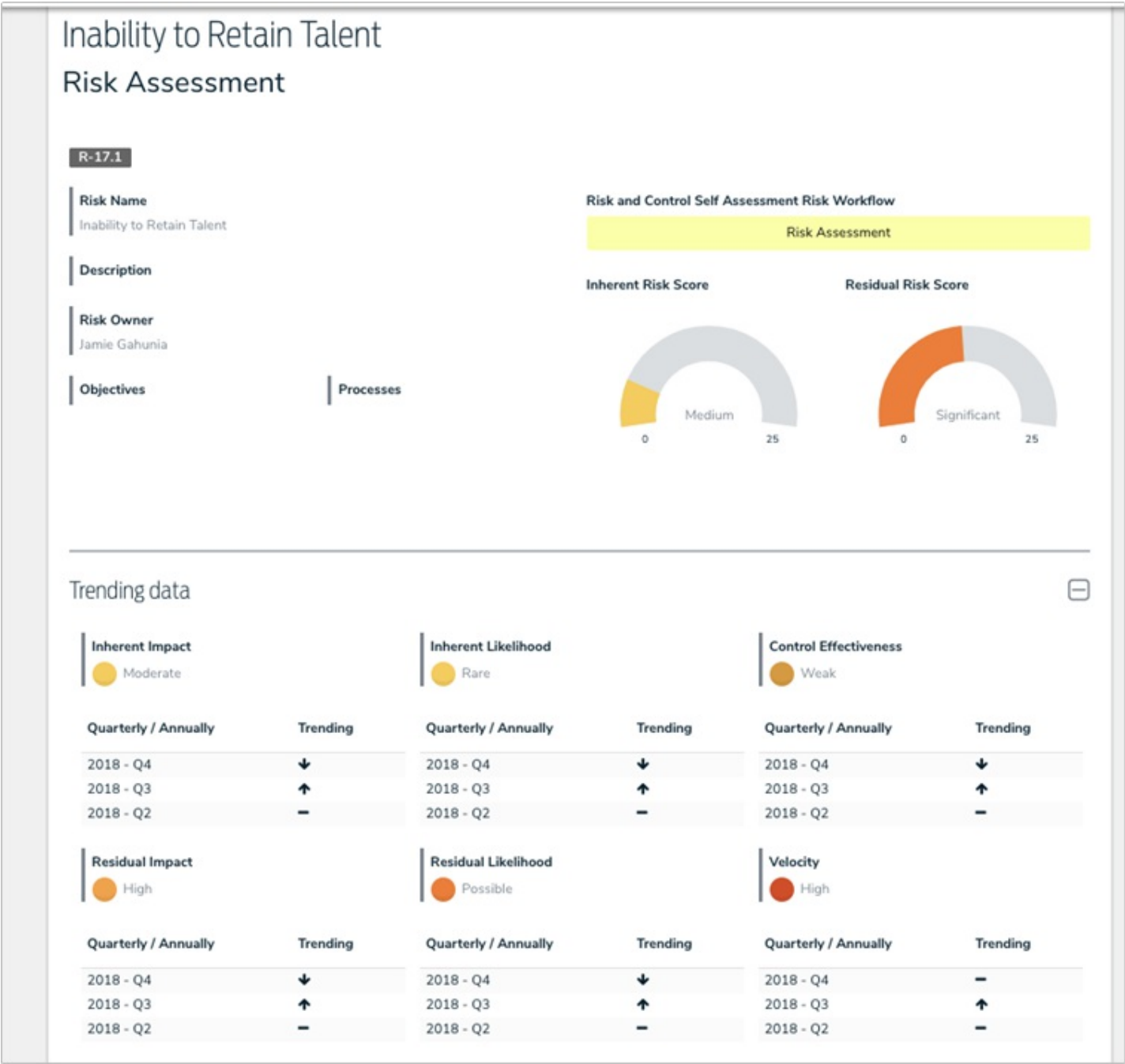
R-17.2 Risk and Control Self Assessment2018 - Q2BUSINESS UNIT 1NOT STARTED

Intuitive Display

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The intuitive display feature on assessments allows users to view past assessment results while reviewing objects and instances. Past assessments are displayed through the Assessment Table option for form elements. If the past assessments contain numeric values, they can be used to display whether the data is trending upwards or downwards.



Assessment Scoping

After an assessment (e.g. Risk, Audit, or Quarterly Control) is created, users can search, explore, and filter data via the new scoping tool, which is accessed through the new scoping form action. The ability to explore permissioned data helps users draw connections between data across an organization so that testing can be done in sync and makes it easy to include data from previous assessments (e.g. relaunching an assessment from a previous quarter or leveraging another team’s conclusions).

RESOLVER

Risk Management

Identify Risks **Assess Risks** Issues and Actions Monitor Risks Reports Risk Library

QUARTERLY RISK ASSESSMENT

Q3 2017 Toronto [EDIT ASSESSMENT DETAILS](#)

Add a focus Process to your assessment from the list below. If it's necessary, you can add multiple Processes to focus on. You'll be able to review and perform more granular scoping before you confirm the scope of your assessment.

Filters applied Location Toronto

Filter Processes

- By Name
- By Assessment Type
- Dimension Type
 - Location
 - Toronto
- By Description
- By Workflow State
- By Risk Rating
- By Inherent Risk
- By Residual Risk

P-1 Bank Account Management and Reconciliation
Bank Account Management and Reconciliation

Library In Progress PAST ASSESSMENTS

Quarterly Risk Assessment Q3 2017 Toronto Complete [+ ADD TO SCOPE](#)

Quarterly Risk Assessment Q1 2017 Toronto Complete [+ ADD TO SCOPE](#)

CSA 2017 Toronto Complete [+ ADD TO SCOPE](#)

P-2 Cash Management, Treasury, Cash Disbursement (Incl Cash flow, Reconciliation)
Cash Management, Treasury, Cash Disbursement (Incl Cash flow, Reconciliation)

Library In Progress PAST ASSESSMENTS Not Available

P-3 Debt and Interest Expense/Manage Cash Flow/Treasury
Debt and Interest Expense/Manage Cash Flow/Treasury

Library In Progress PAST ASSESSMENTS [+ ADD TO SCOPE](#)

P-4 Foreign Exchange Risk (Hedging and Currency Translation)
Foreign Exchange Risk (Hedging and Currency Translation)

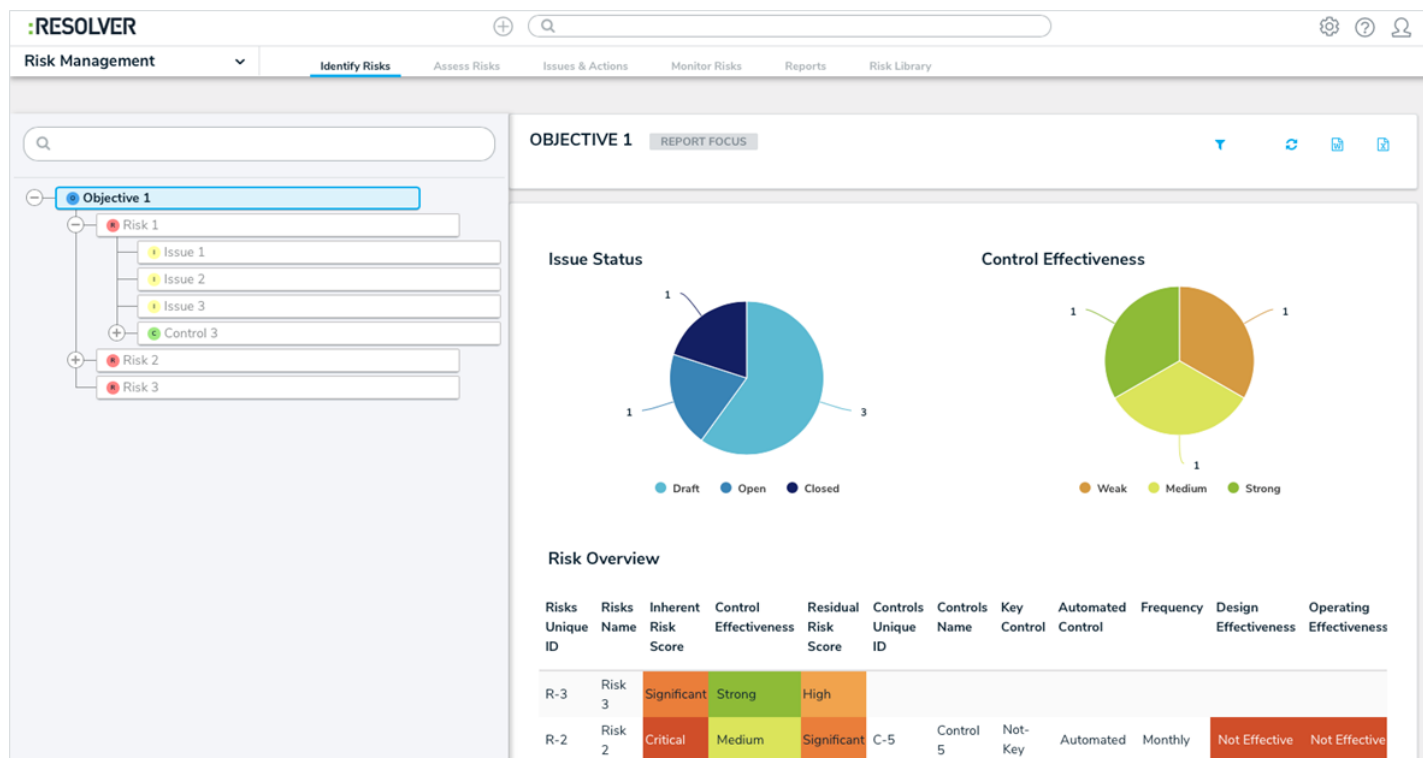
Library In Progress PAST ASSESSMENTS [+ ADD TO SCOPE](#)

There are currently 0 objects added and ready for review

Navigation Form (Tree Browsing)

The Navigation Form is a new form type that provides additional context for users viewing and working with data that's related to their current tasks. When this form type is created, administrators select a data definition and a form or report to display for the object and their states. When a user is viewing the form, each object type in the data definition is represented as a tree with expandable nodes. Clicking an object type will display the administrator-defined form or report.

Because this form is based on a chosen data definition, the same data can be displayed in another navigation form, but with different starting (anchor) points. For example, in the screenshot below, the Objective object type is the anchor and Control objects are available through the data path (tree). If an administrator wanted to create a form with the Control object type as the anchor to view all related risks and issues, those same Objective objects from the original form could still be accessible through its relationships or references to Control.



Workflow Orchestration

Using the new Send Orchestration Event workflow action and Consume Orchestration Event trigger, an orchestration event moves multiple objects from different object types into other states at the same time. For example, when the Send Orchestration Event action is added to the Audit object type, closing an Audit object will also close all open Issue objects. Once the action is created (e.g. on the Audit object type), it's added to all other relevant object types' workflows (e.g. Issues) through the orchestration event trigger. The object types this action can be added to is determined by the data definition selected when the action is created.

Workflow Actions

In addition to the Send Orchestration Event action, workflows now have the following new transition actions available, including:

- **Clear Fields/Roles/Relationships:** Clears the values from selected fields, roles, or relationships on a form. These actions are helpful when users want to relaunch an assessment, but don't want to manually clear previous assessment data. Note that you cannot use this action to clear formula data.
- **Set Field Data:** Auto-completes a Date & Time field saved on the object type based on the date the object transitioned to the next state. Administrators can choose to auto-populate the current date, the current date plus a selected number of days, or the current date less a selected number of days. This action could be used to set time stamps for start or completion dates on assessments, set deadlines, extend deadlines, etc.

Auto-Created Workflows & State Categories

Each new object type is now created with a default workflow that includes the following states:

- Creation
- Draft
- Active
- Archived

These states, except Creation, can be edited and deleted as needed.

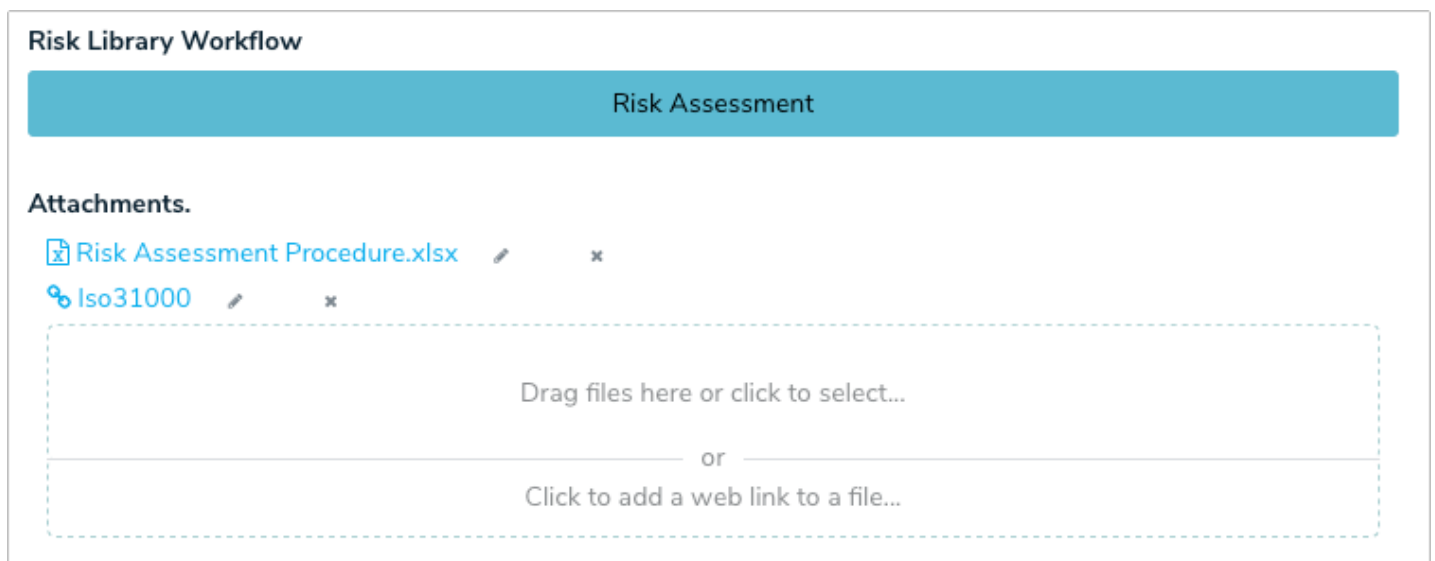
Workflow State Categories

The ability to categorize workflow states will enable CORE to do the following in future releases:

- Create the ability to remove archived data from across the app.
- Provide an accurate progress indicator.
- Create visual representations of completion on the new tree visualization in the Navigation form.

Hyperlink Field

The Attachment field type now allows users to upload files, files and links, or links only.



The screenshot shows a web interface for the 'Risk Library Workflow'. At the top, there's a teal header bar with the text 'Risk Assessment'. Below this, the section is titled 'Attachments.' and lists two items: 'Risk Assessment Procedure.xlsx' and 'Iso31000'. Each item has a small icon, a pencil icon for editing, and a close 'x' icon. Below the list is a large dashed rectangular box containing the text 'Drag files here or click to select...' and 'or' followed by 'Click to add a web link to a file...'.

Report Parameters & Filters

- Administrators can now add parameters to the table report component when the anchor object type is selected from the data series.
- Users can now filter report data using Date & Time fields.

Search

- The search function has been simplified to display results as groups or as detailed results. When viewed as detailed results, filters can be applied to further refine the data.
- The Past Assessment feature displays any related assessments on individual search results as clickable links.
- Users can filter search results by assessment type or dimensions.

Miscellaneous

- Heat maps displaying more than 10 objects indicate the actual number of objects (versus the previous "10+").
- The Swagger API documentation page now contains a search bar.

- The Create option is now available for relationship and reference tables viewed in a palette.
- Administrators can set references as required fields on workflow states.
- The Export Organization and Import Organization functions in Org Manager are now separated into tabs.
- Improved the overall stability of the Org Manager.

Introduction Overview

Resolver Core is a cloud-based system that helps you quickly and easily to record, track, report, and manage information. Core is completely configurable, which allows you to create custom applications, along with custom forms, fields, workflows, reports, and more to ensure that the needs of your organization and industry are met as you collect and analyze data.

System Requirements

Core runs on the latest versions the following Internet browsers:

- The latest version of Google Chrome; or
- Microsoft Edge (recommended) or Internet Explorer 11.

Visit the links below to download Chrome, Edge, or Internet Explorer 11 and to ensure your computer meets the minimum system requirements.

- [Download and install Chrome](#) – Google Chrome Help
- [Download Microsoft Edge](#) – Microsoft Download Center
- [Download Internet Explorer 11](#) – Microsoft Download Center

Data Region

You can review the geographical region where your organization's data is being stored from the Core login screen or by clicking the  icon in the top bar.

Your organization's data region is selected upon implementation. Contact [Resolver Support](#) should you require additional information.

 Login

Email Address

 user@domain.com

Password

 Password

CHANGE PASSWORD

LOGIN

 Your data is currently being stored in Canada

Data region information on the login screen.



Help

Terms of Service

Support

v2.5.0-build-rc.3

Data Region:
 CAN

Data region information in the top bar.

Who Should Use This Guide

This guide is for users operating Core with administrative rights enabled. Note, however, that your account may not have access to some or all the features or settings discussed in this guide.

Important Notes About This Guide

This guide is designed to help administrators learn the concepts behind Core's features and how to edit its settings and functions, however, depending on your app and the settings applied to your profile, **you may not be able to edit some or all the settings and features referenced in this guide.**

Additionally, the screenshots used and the applications, object types, and other elements referred to are not specific to a particular Core application, so your version of the user interface may differ.

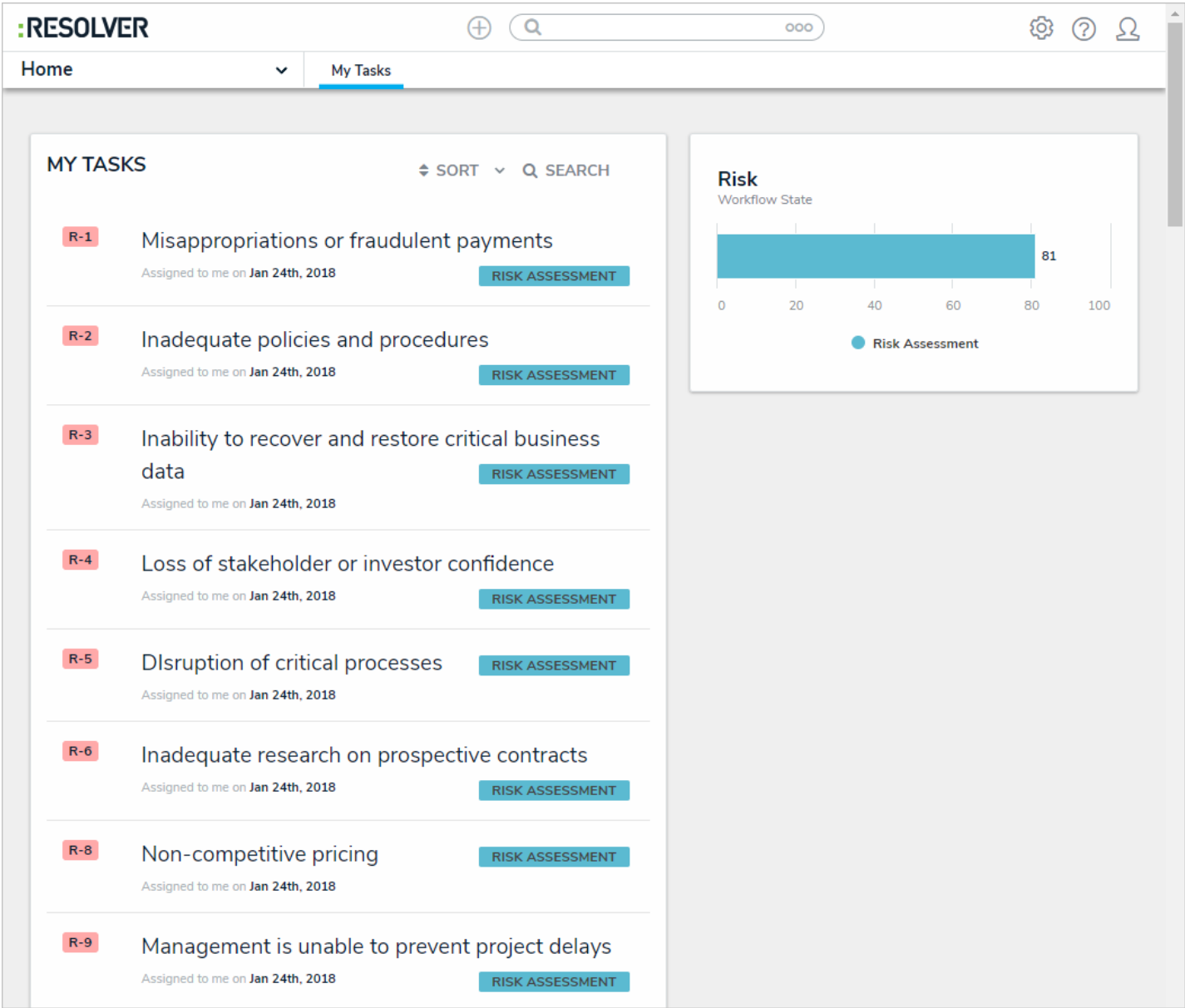
Notes, Tips & Warnings

Throughout this guide, you'll see the following symbols:

	Indicates a NOTE .
	Indicates a TIP .
	Indicates a WARNING .

User Interface

By default, the Core homepage displays the **My Tasks** tab, which shows existing objects that require your attention. If any reports have been **starred**, they will appear beside the **My Tasks** tab. The column chart to the right of your tasks is summary of the current **workflow states** of those objects. At the top of each page is the **top bar** and **nav bar**.



The home page, displaying My Tasks.

Top Bar

The following components are in the **top bar** on every page:



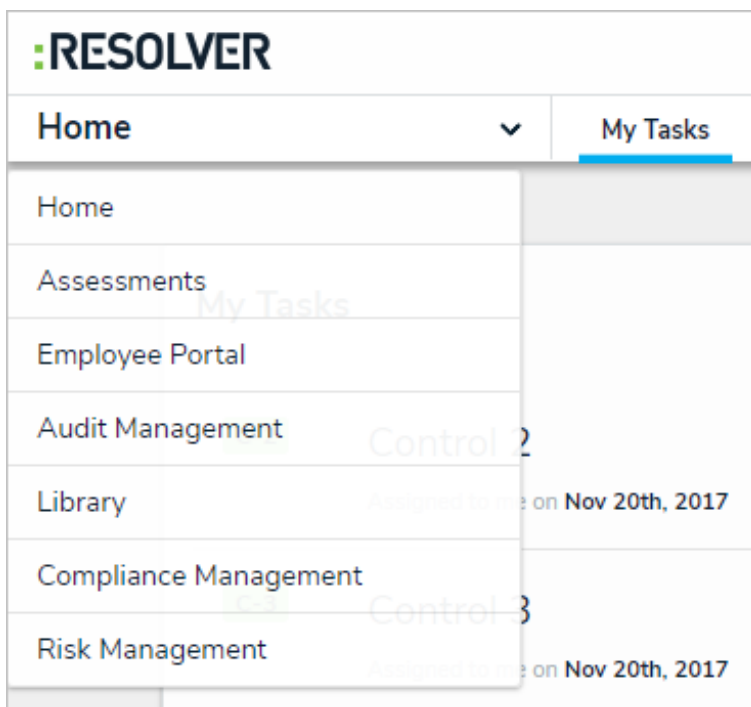
The top bar, which is displayed on every page.

- 1. **Resolver or custom company logo:** Clicking the logo will return you to the **My Tasks** page or a **starred report** you've flagged as your landing page.

2. **Quick Create:** Clicking the icon will open the [Quick Create](#) feature, which allows you to create objects outside of applications.
3. **Search:** Enter keywords to search for objects by [keyword](#) within the organization. Clicking the  icon allows you to search by [object type](#).
4. **Administration:** Clicking the  icon will display the [administrative options](#). If you don't have admin privileges enabled, this icon will not be visible.
5. **Help:** Clicking the  icon will take you to the Resolver Knowledge Base, Terms of Service, or the Resolver Support site. Clicking this icon will also display your current version of Core and your organization's [data region](#).
6. **User:** Clicking the  icon displays the name of the currently logged in user, as well as provides links to the **My Tasks** page and the **Logout** function.

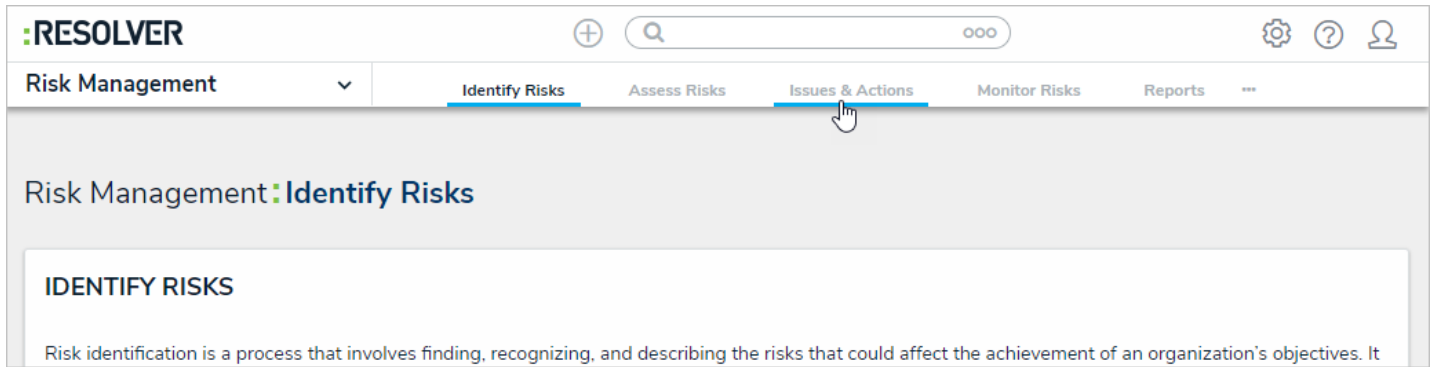
Nav Bar

The **nav bar** contains a dropdown menu that displays links to the home page and all the [applications](#) your [role](#) has permission to view (if any). When working in the **Home** area of your organization (after logging in, clicking the **Home** link in the dropdown, or clicking the company logo in the top left of any page), the **My Tasks** tab and any [starred reports](#) tabs appear in the nav bar.



The nav bar. The options in the dropdown menu change when working in the Admin settings.

Clicking the name of the application in the nav bar menu will display the application and its [activities](#), which are displayed as clickable tabs. The tab for the first activity in the application is selected by default. To view more tabs (if any), click the  icon.



The nav bar displaying the activities in a selected application. Applications are selected from the dropdown menu to the left and activities are opened by clicking the tabs.



Clicking an activity tab displays the landing page for the activity and not the last object or report you may have been working with.



The options in the nav bar change if you're viewing the administrative settings. See [Admin User Interface](#) for more information.

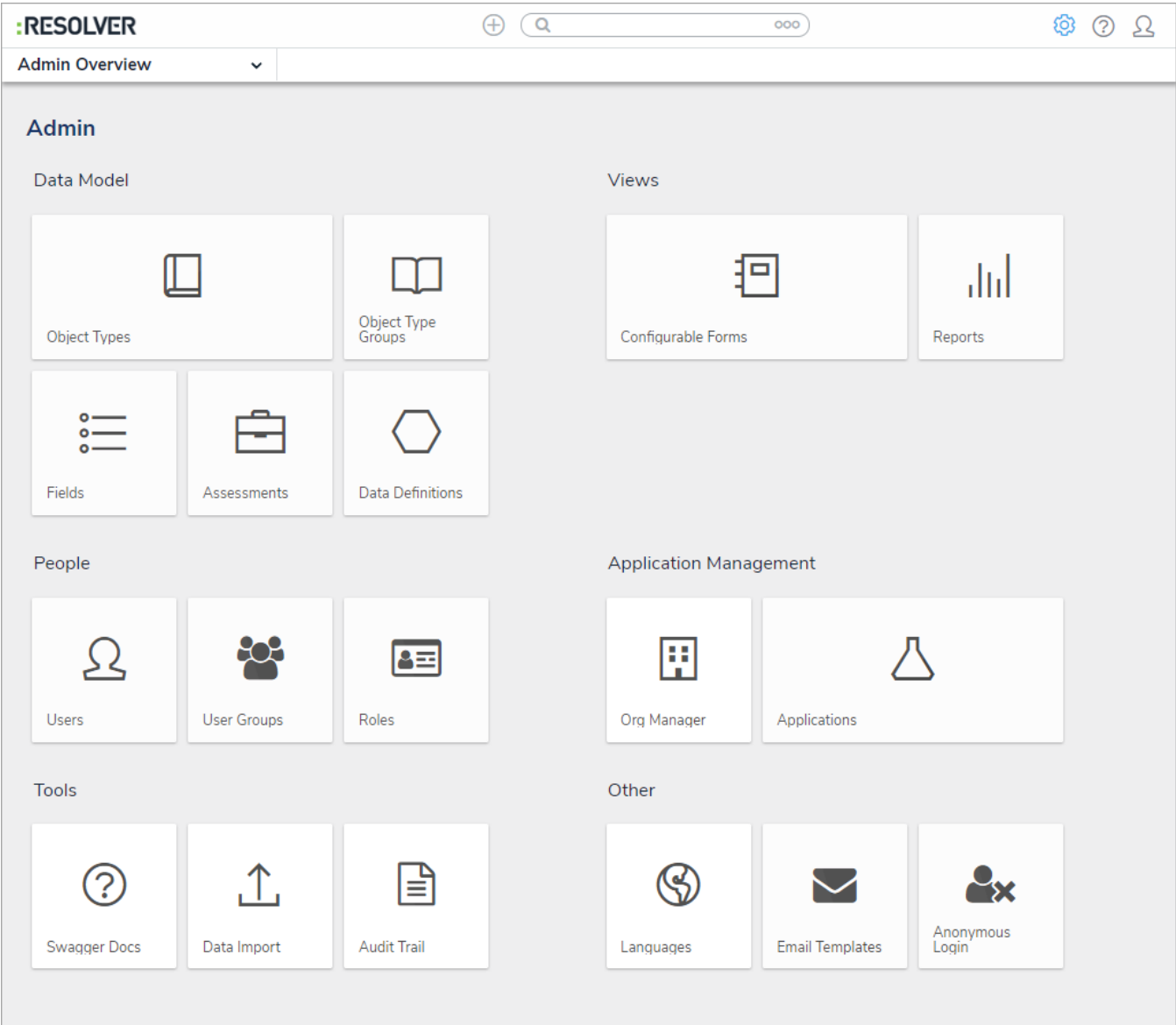
Admin User Interface



Users with administrative rights enabled in their [profiles](#) can access the **Admin** page by clicking the  icon in the [top bar](#) on any page. If you don't have administrative access enabled, this icon will not be visible.

The administrative settings are available in the following groups:

- **Data Model:** Settings for object type groups, assessments, and data definitions.
- **Views:** Settings for configurable forms and reports.
- **People:** Settings for users, user groups, and roles.
- **Application Management:** Settings for the Org Manager and applications.
- **Tools:** Swagger Docs (API) and the Data Import and Audit Trail tools.
- **Others:** Settings for languages, email templates, and anonymous logins.

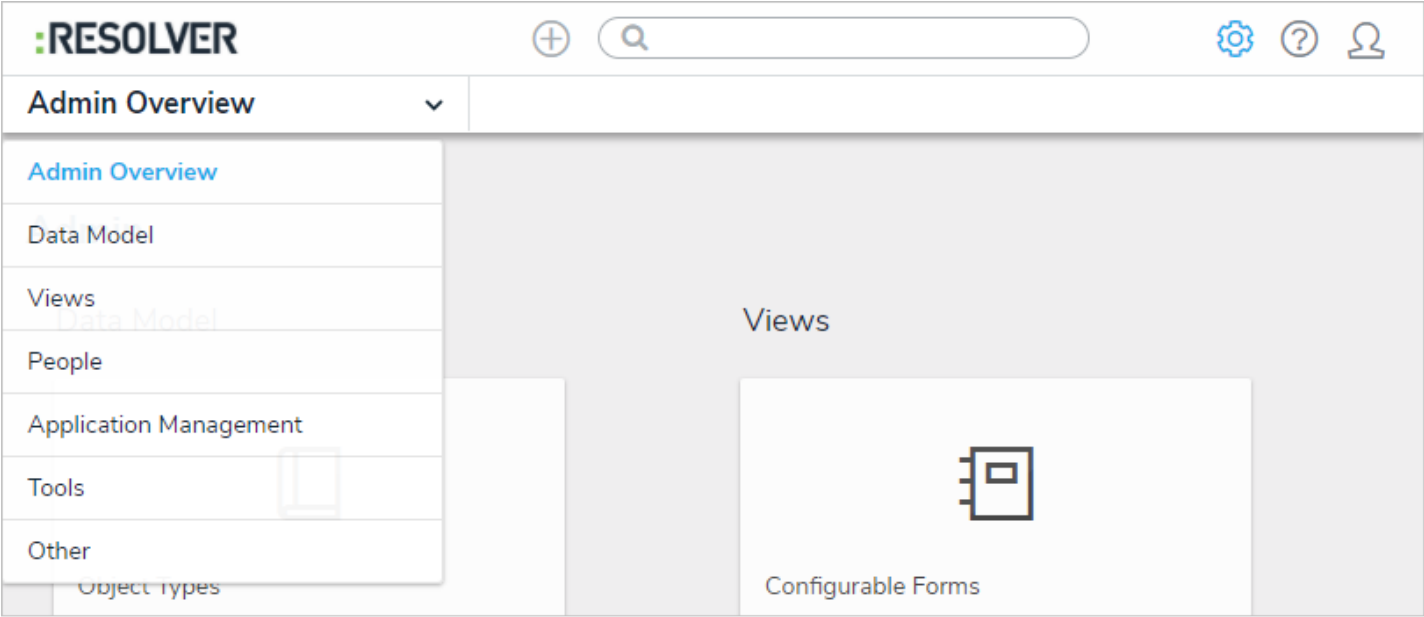


The Admin page.

Admin Nav Bar

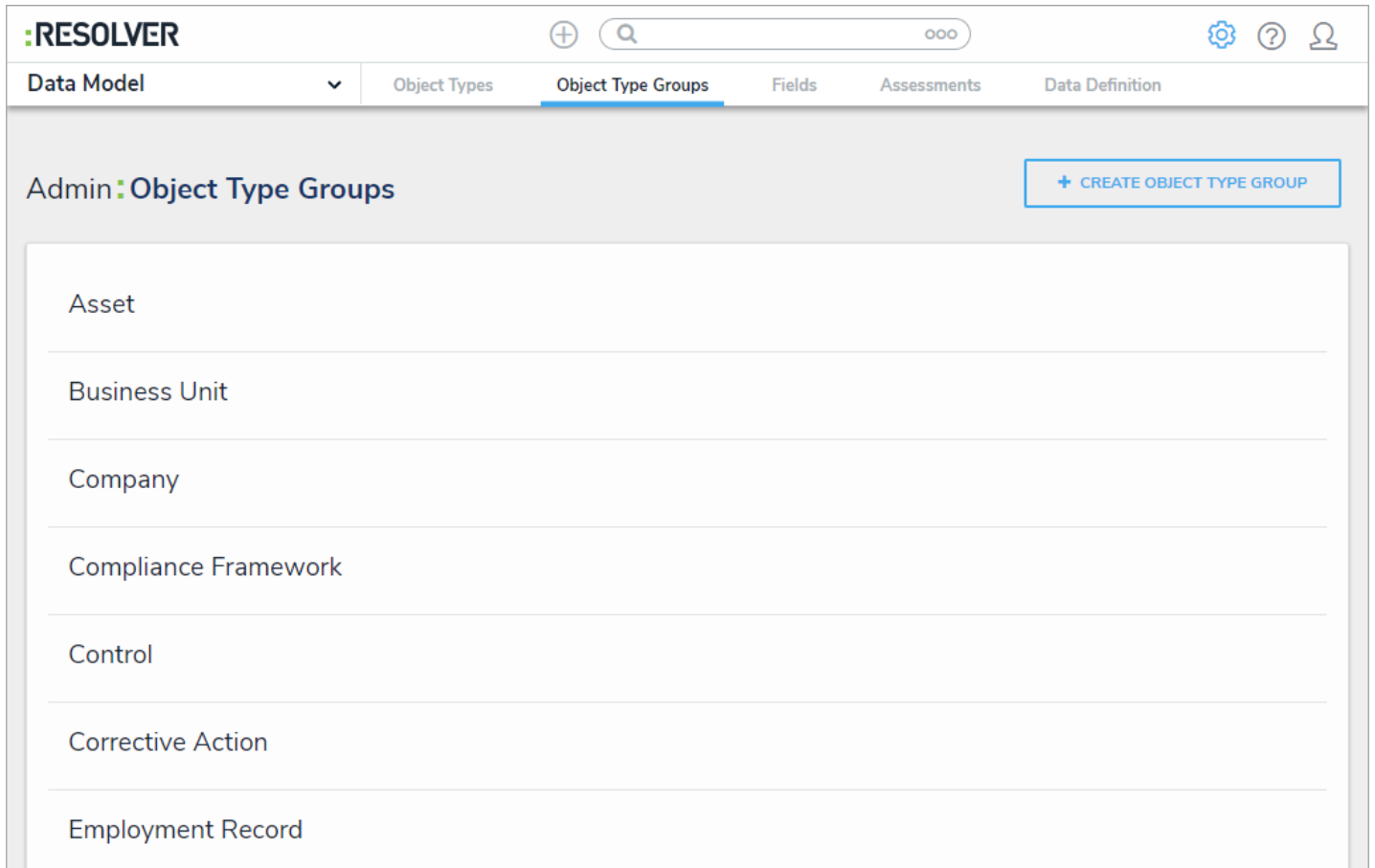


After clicking the  icon, the **nav bar** will no longer display any applications or activities you may have access to. Instead, it will display links to the setting groups (i.e. **Data Model**, **Views**, **People**, **Application Management**, **Tools**, and **Other**) and will continue to do so until you've navigated away from the admin settings.



The admin nav bar displaying the settings groups.

Clicking on an individual setting on the **Admin** page will display tabs for the other options in the settings group. For example, clicking **Object Type Groups** in the **Data Model** section will display the object type groups settings page, as well as tabs for all the settings available in that group (i.e. **Object Types**, **Object Type Groups**, **Fields**, **Assessments**, and **Data Definitions**).



Tabs in the admin nav bar displaying tabs for the available settings in the Data Model group.

Clicking on a settings group in the nav bar menu (e.g. **People**) will also display the tabs for the settings in the group. The tab for the first option in the group will be selected by default (e.g. **Users**).



Clicking on a tab will display the main page for the selected setting. For example, if you were working on the **Edit Object Type** page for the Incident object type, then you clicked the **Fields** tab, clicking the **Object Types** tab again will display the **Object Types** settings page, not the **Edit Object Type** page for Incident.



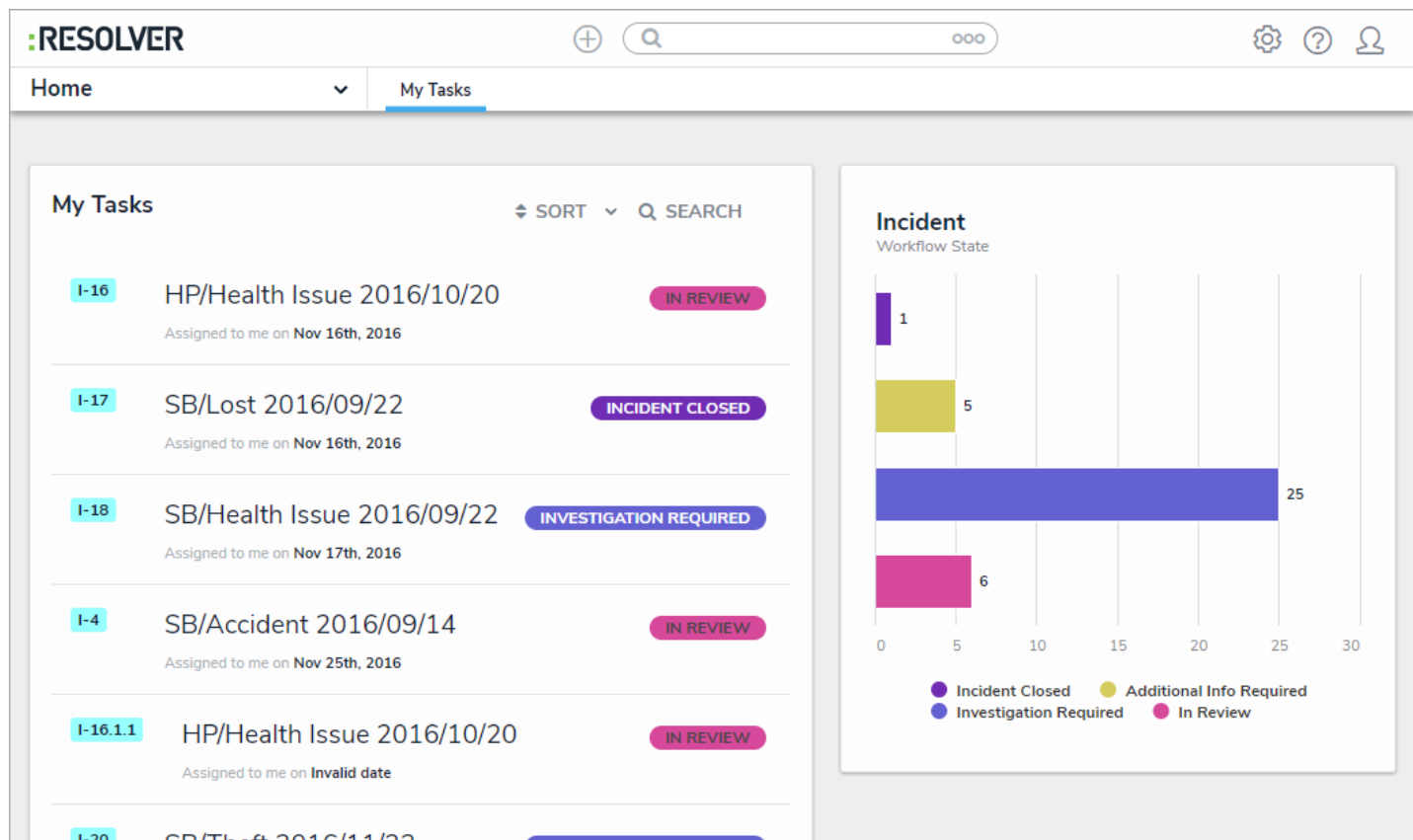
To return to the **Admin** page, click the

icon in the top bar of any page or select **Admin Overview** from the nav bar dropdown menu.

To return to the homepage and access the applications and activities you have permission to view, click the company logo in the top-left corner of any page.

My Tasks

My Tasks is a tab in the nav bar that displays a list of existing objects that have been assigned to the user who is currently logged in. By default, the **My Tasks** tab is displayed as the landing page whenever you're working in the **Home** area of your organization (upon login, after clicking the company logo in the top-left of the page, or selecting **Home** from the nav bar dropdown menu). Any [starred reports](#), including those that may have been flagged as the landing page, will always appear beside the **My Tasks** tab in the nav bar.



The My Tasks page.

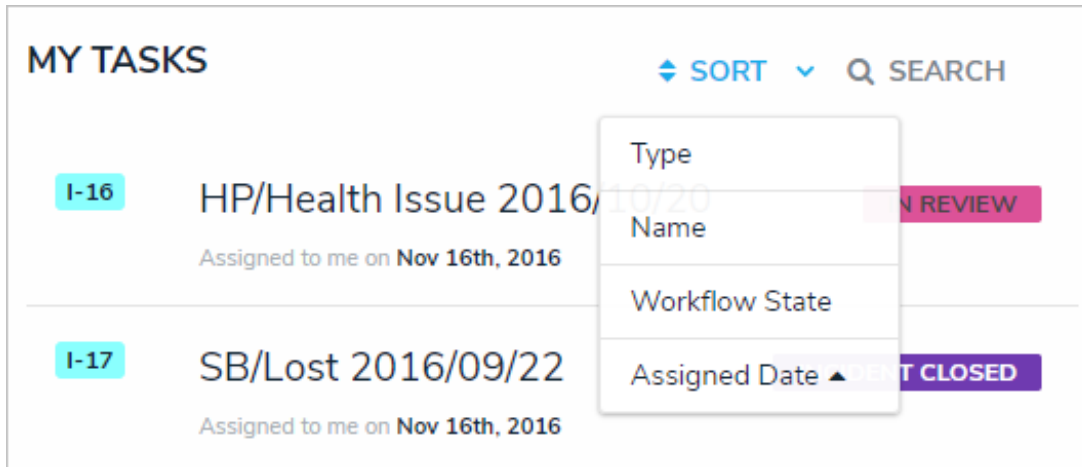
The charts to the right of the **My Tasks** section on this page outline the number of objects assigned to you and their current [workflow states](#). You can access this page at any time by clicking the Resolver logo (or your company logo, if configured) in the top-left corner of any page or by clicking **My Tasks** in the nav bar while working in an application or activity. Note that if you're working in the [Admin settings](#) you will need to click the logo to return to the My Tasks page.

Objects can be viewed by clicking on them, but they won't appear in your tasks unless the **Assign** option has been enabled on one or more states in your role's [workflow permissions](#) for an object type. Additionally, the object must currently be in the state selected in the workflow permissions before it will appear in your tasks or on the charts. Edit, manage, and delete rights are configured through your role's workflow permissions, as is the form that's displayed when the object is viewed.

To arrange how the objects appear on the page, click **Sort**, then select one of the following options:

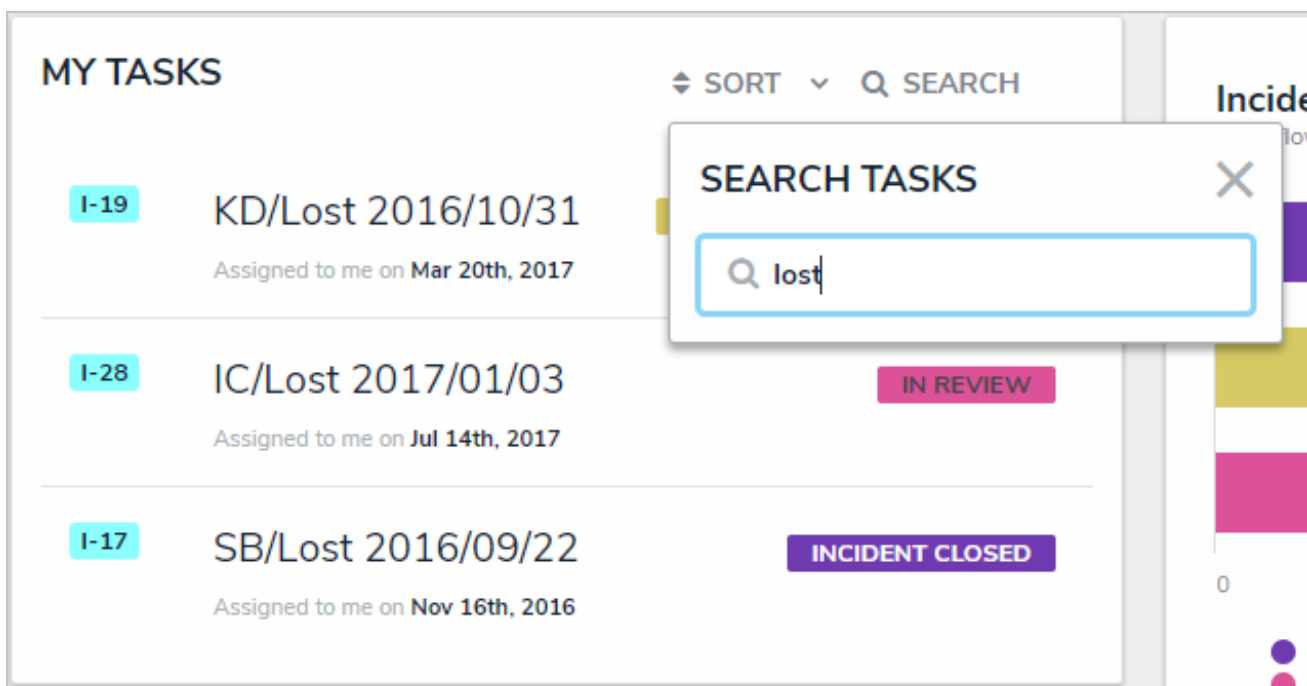
- **Type:** Sorts the assigned objects by [object type](#) name.
- **Name:** Sorts the assigned object by its [name property](#).
- **Workflow State:** Sorts the assigned objects by their current [workflow states](#).
- **Assigned Date:** Sorts the assigned objects by the date they were assigned to you.

By default, clicking an option will sort the objects in ascending order (alphabetically or by newest date first). Clicking the option again will sort the objects in descending order.



The Sort option on the My Tasks page.

You can narrow down which objects are displayed by entering keywords from one or more object names. To once again view all the objects, click **Search** then click the **X** to remove the keywords.

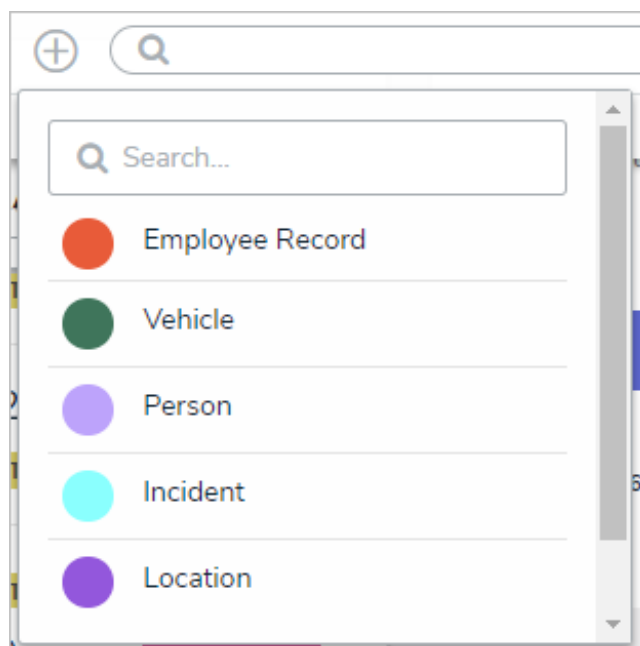


Clicking Search then entering keywords from an object's name will narrow down which objects are displayed.

Quick Create

You can create new objects outside of an [action](#) by using the **Quick Create** feature. The object types displayed in Quick Create are determined by the object types added to your role that also have [Create permissions](#) enabled.

The Quick Create feature is available on any page through the top bar and can be accessed by clicking the  icon, then selecting the applicable object type from the dropdown menu. The form displayed on each object type in Quick Create is selected in your role's [workflow permissions](#) for the **Creation** state. If no form was selected, the object type's default form will be displayed.



The Quick Create feature. The object types displayed in this dropdown menu are determined by your role's permissions.

Logging In

If you're the primary administrator for your organization's Core account, Resolver will provide you with the URL and login credentials required to sign in, otherwise you'll receive an email with instructions on creating your password once another administrator creates a user account for you.

If you're using single sign-on authentication to log into Core, see the [Single Sign-On \(SSO\)](#) section for more details.



The login screen indicates which country your data is currently being stored. See the [Data Region](#) article for more information.

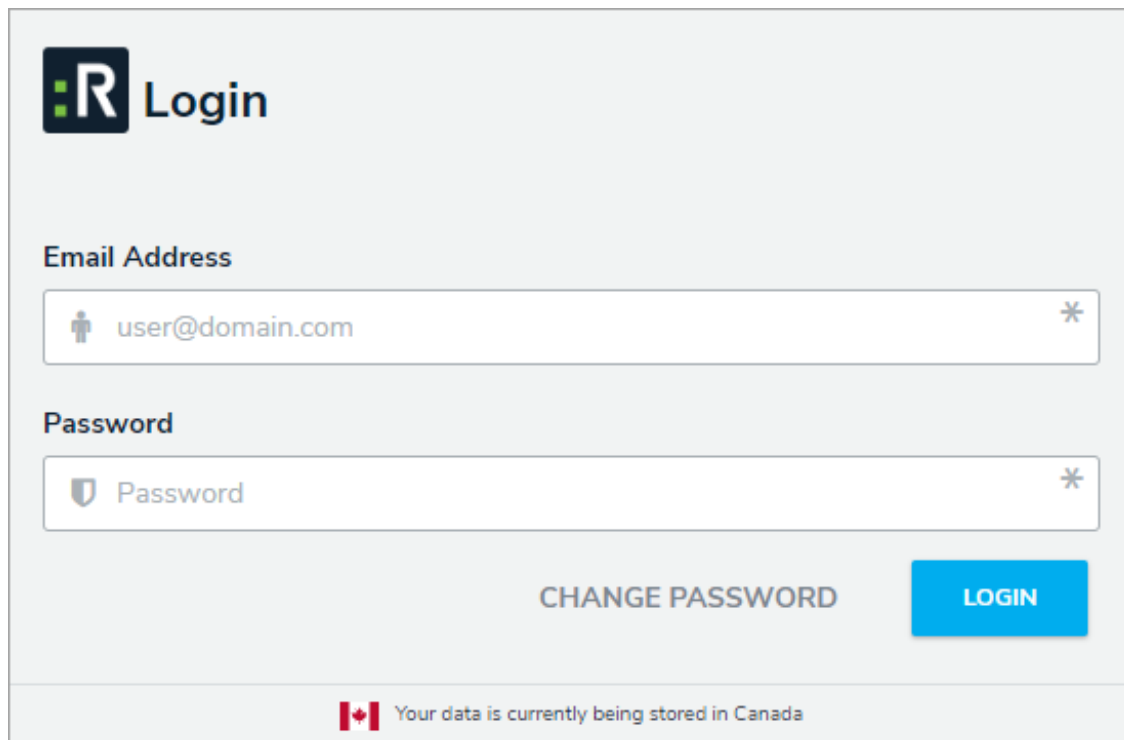
To log into Core:

1. Open the email sent to you from Resolver Core.
2. Click the **Create Password** link from within the email.
3. Enter your password in the **New Password** field. See the [Password Requirements](#) section for more information on the password conditions that must be met.
4. Click  **Show Password** to confirm the password entered is correct.
5. Click **Set Password**.
6. Review the **Terms of Service**, then click **Accept Terms**.



All new users must accept the **Terms of Service** before continuing.

7. From the screen confirming that your password was successfully created, click the **Log In** link.
8. Enter the email address that received the original email in the **Email Address** field.



R Login

Email Address

 user@domain.com *

Password

 Password *

[CHANGE PASSWORD](#) [LOGIN](#)

 Your data is currently being stored in Canada

The Login screen.

9. Enter your password in the **Password** field.
10. Click **Login** to be taken to the Core homepage.



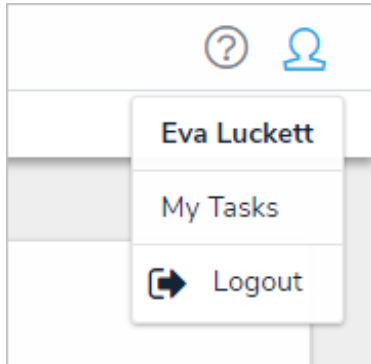
If your version of Core includes multiple organizations, you'll need to select the organization you'll be working in before the Core homepage is displayed.

Logging Out

After ten minutes of inactivity, you'll be prompted to refresh your session. If, after five minutes, you haven't refreshed the session, you'll be logged out automatically (note that alternate settings may have been configured by your administrator).

To log out of Core:

1. Click the  icon in the top-right corner of the nav bar.
2. Click **Logout**.



The logout option in the nav bar.

Multi-tenancy (Multiple Organizations)

If Core has been set up to provide you with access to more than one organization, after logging in you can click on an organization to access it. If you're already working in an organization but wish to access an a different one, you must first [log out](#) then select an organization after [logging in](#) .

Single Sign-On (SSO)

If your organization requires single sign-on authentication (SSO), review the [Resolver Core SAML Configurations for SSO](#) document for instructions on implementation.

If SSO is enabled, entering your email address on the Core login page will redirect you to your identity provider, where you'll need to enter the login credentials configured for your SSO account. If you're logging into CORE for the first time, you will need to accept the Terms of Service before you can successfully log in.

Logging out of Core will end your SSO session. Additionally, after ten minutes of inactivity, you'll be prompted to refresh your session. If, after five minutes, you haven't refreshed the session, you'll be logged out automatically.



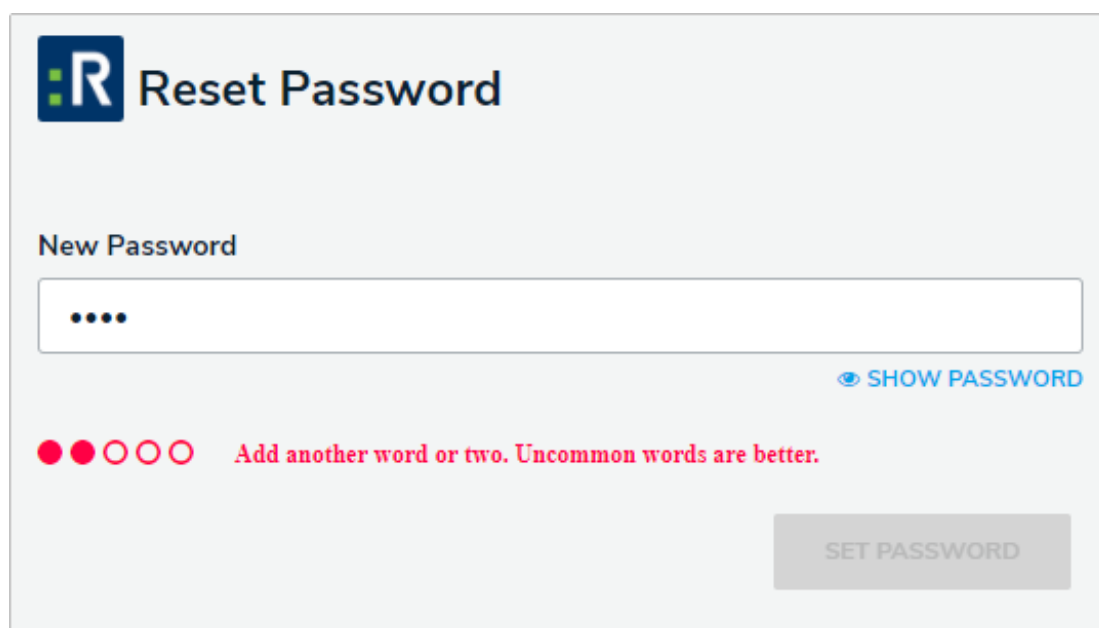
If SSO is enabled, new users will not be required to create a password nor will they receive an email with a link to Core. As such, administrators should provide new users with the URL to access their organization.

Password Requirements

Your Core password must contain at least 9 characters, which must include letters. Spaces are permitted.

When creating or resetting your password, you'll see a color-coded password strength indicator. Each color represents the following:

- **Red:** Your password does not meet any or most of the minimum requirements.
- **Yellow:** Your password does not meet some of the minimum requirements.
- **Green:** Your password meets the minimum requirements.
- **Blue:** Your password surpasses the minimum requirements.



The Reset Password screen. In this case, the password entered in the New Password field does not most of the minimum requirements.

Your password expires every 90 days. At the end of the 90-day period, you'll be prompted to change your password, following the requirements outlined above, after successful login. If you forget your password, you can send a reset link to your account email by clicking **Change Password** at the login screen.



You cannot reuse your current password when resetting it after expiry or resetting it via email.

Search Overview

With the search tool, you can search the Core organization by keyword(s), object type(s), or both. When you search for individual object types, you're given additional options to refine the search results by name, description, unique ID, state, and other optional filters.

Numeric Searches

- Entering a number's full numeric term will return the exact result. For example, searching for "000000123" will return "000000123".
- If a number is separated by spaces, hyphens, parentheses, or other non-numeric or non-alphabetical characters, searching for a separated portion of that number will return applicable search results. For example, searching for "234" or "8910" will return "1 (234) 567-8910". Likewise, searching for "123" will return "123 456 789".
- Searching for a portion of a number that is **not** separated by non-numeric or non-alphabetical characters will not return any search results. For example, searching for "000000" will not return any search results, but searching for "000000123" will return "000000123".
- If a phrase contains a mix of numbers and words that are separated by spaces, hyphens, parentheses, or any other non-numeric or non-alphabetical characters, searching for a portion of that phrase will return applicable search results. For example, searching for "123" will return "Number 123."

Text Searches

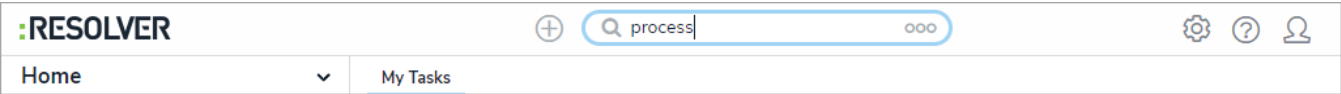
- Text search terms must be in their complete forms to return results. For example, searching for “accident” will return “accident”, but searching for “Acc” will not return any results.
- If a word or phrase is separated by spaces, hyphens, parentheses, or other non-alphabetical or numeric characters, searching for a separated portion of that phrase will return applicable search results. For example, searching for “John” will return “John Doe.” Likewise, searching for “double” will return “double-check”.
- If a phrase contains a mix of words and numbers that are separated by spaces, hyphens parentheses, or any other non-alphabetical or non-numeric characters, searching for a portion of that phrase will return applicable search results. For example, searching for “Doe” will return “John Doe (555) 555-5555.”
- Searching for a root word will return that root word and its related forms. For example, searching for “accident” will return “accidental,” “accidentally,” “accidents,” etc.
- Search terms are not case-sensitive.
- Stop words (words that are considered unimportant by the search tool) are automatically removed from the search terms. Examples of stop words include:
 - “a”
 - "an"
 - "and"
 - "are"
 - "as"
 - "at"
 - "be"
 - "but"
 - "by"
 - "for"
 - "if"
 - "in"
 - "into"
 - "is"
 - "it"
 - "no"
 - "not"
 - "of"
 - "on"
 - "or"
 - "such"
 - "that"
 - "the"
 - "their"
 - "then"

- "there"
 - "these"
 - "they"
 - "this"
 - "to"
 - "was"
 - "will"
 - "with"
- Searching for words in possessive form will return both the possessive and non-possessive form of the word. For example, searching for “John’s” will return both “John’s” and “John.”
 - If searching for words with special characters or accents, you must include the special character or accent in the search. For example, searching for “Joël” will return results, while searching for “Joel” will return no results.

Search Core

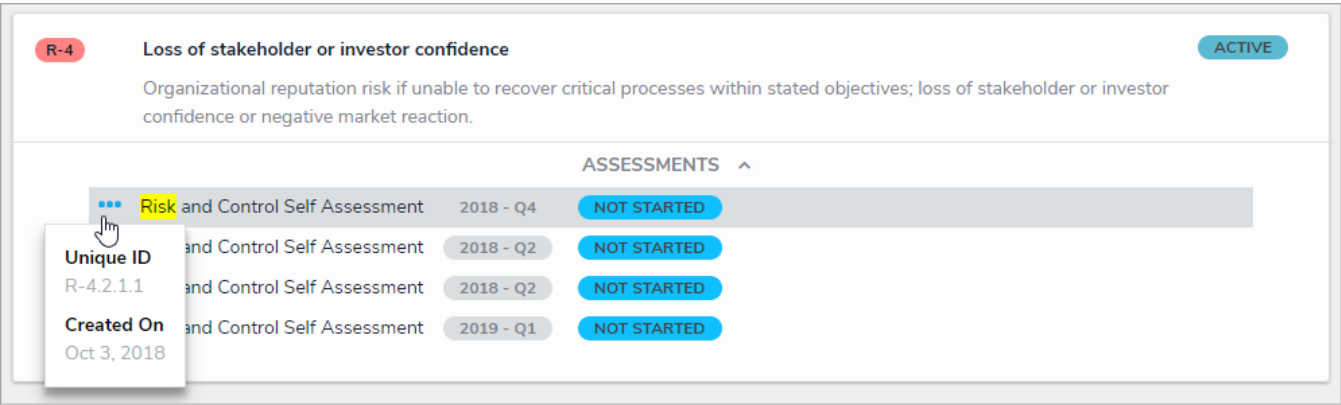
To search Core by keyword:

- 1. Click the search text field in the nav bar, enter the name of an object, then press **Enter** on your keyboard.



Entering keywords in the search bar.

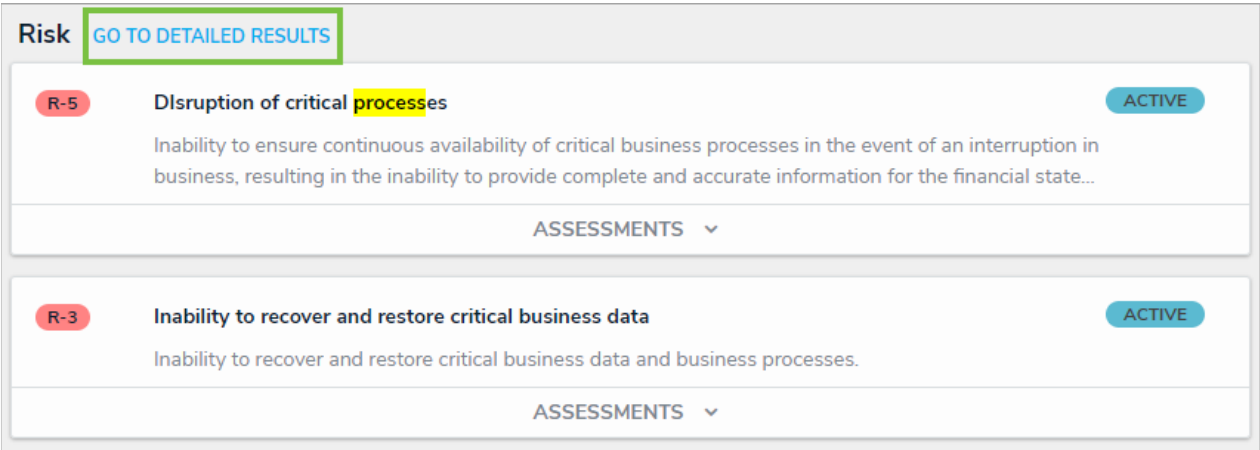
- 2. Review the search results, which are organized by object name. The results also display the objects' unique IDs and current workflow state.
- 3. To view an individual object, click the area below the object's unique ID and name.
- 4. To view assessment instances of an object, click the **Assessments** link. To open the instance record, click it. Hovering your cursor over the ellipsis will display the instance's unique ID and the date it was created.



Search results displaying individual objects and their instances.

 If an object has not been previously assessed, it will not have any instances and the **Assessments** link will be hidden by default.

- 5. To apply search filters:
 - a. Click **Go to Detailed Results** near the top the search results for each object type.



Click Go to Detailed Results for filtering options.

- b. Use the filters in the **Filters** section to the left of the page to narrow down which objects are displayed. The following filters are available on this page for every object type:
- By Name
 - By Assessment Type
 - By Dimension
 - By Description
 - By Unique ID
 - By state
- c. Apply additional filters as needed. These additional filters are based on any plain text, select list, and multi-select fields added to the object type:
- If you're adding a select list or multi-select list filter, choose one or more options from the dropdown menu.
 - If you're adding a plain text filter, enter one keywords into the text box. All special characters, except the @ and ! symbols, will be ignored.

Explore
Search Results

Current Search Parameters: Object Types: Risk; Keywords: process
[Back to Grouped Results](#)

Filters

By Name

By Assessment Type

Select one...

By Dimension

Select one...

By Description

By Unique ID

By state

Select one...

R-4
Loss of stakeholder or investor confidence
ACTIVE

Organizational reputation risk if unable to recover critical processes within stated objectives; loss of stakeholder or investor confidence or negative market reaction.

ASSESSMENTS

R-10
Inadequate system development lifecycle documentation
ACTIVE

The organization's system development lifecycle documentation (SDLC) does not include security, availability and processing integrity requirements of the organizati...

ASSESSMENTS

R-3
Inability to recover and restore critical business data
ACTIVE

Inability to recover and restore critical business data and business processes.

ASSESSMENTS

R-5
Disruption of critical processes
ACTIVE

Inability to ensure continuous availability of critical business processes in the event of an interruption in business, resulting in the inability to provide complete and acc...

ASSESSMENTS

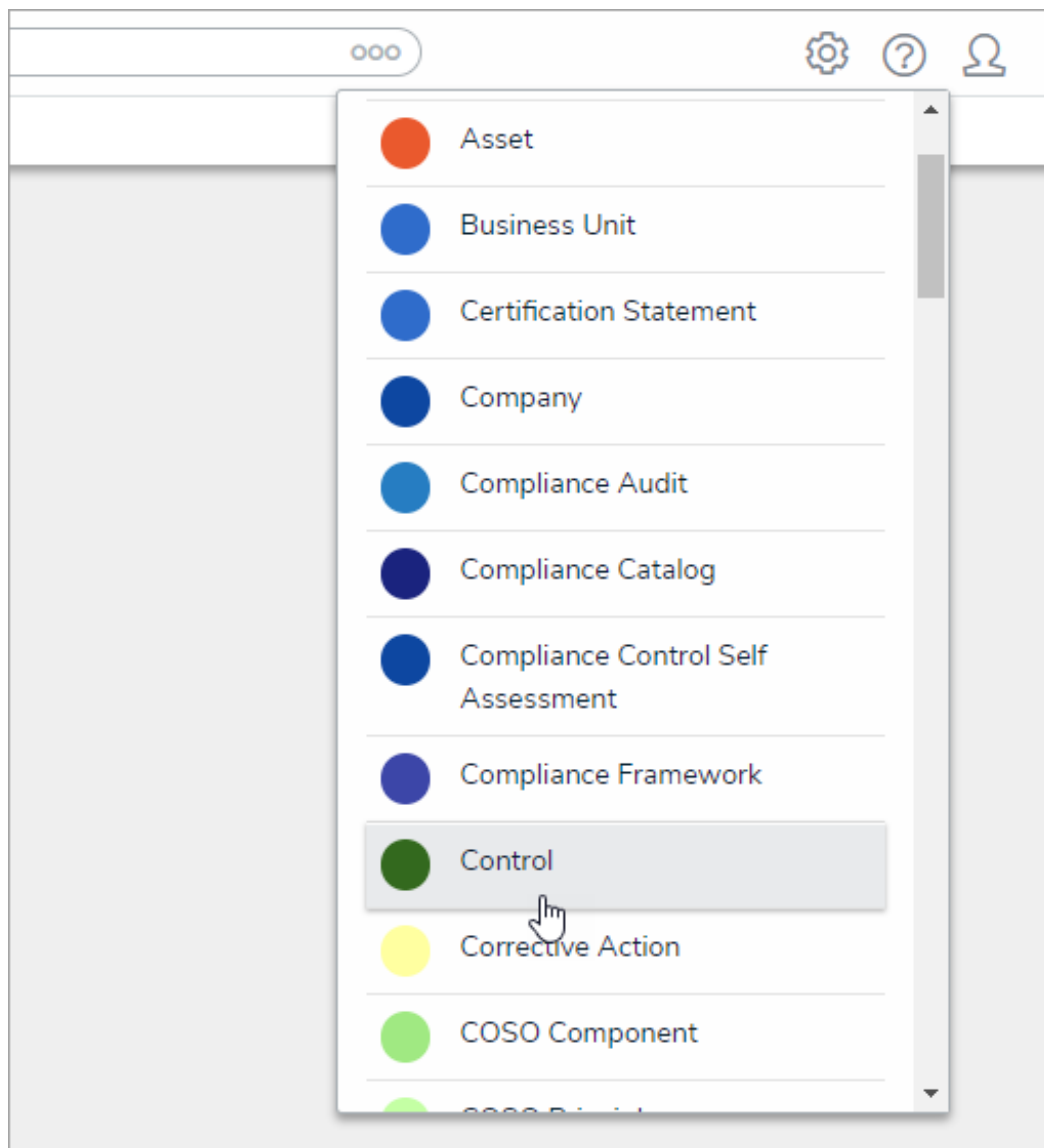
Clicking [Go to Detailed Results](#) to view filter options to narrow down which objects are displayed in the results.

- d. Click an object to view it. To view instances of an object, if any, click the **Assessments** link, then click the instance to open it. If no instances exist, the **Assessments** link will be hidden.
- e. To return to the previous page, click **Back to Grouped Results**.

Search Core by Object Type

To search Core by object type:

1. Click the search text field in the nav bar, click the  icon to display the **Explore By** menu.
2. Click an object type from the list to display its objects in the search results.



The Explore By menu. Clicking an object type in this menu will display search options.

3. From the **Search Results** page, use the filters in the **Filters** section to the left of the page to narrow down which objects are displayed. The following filters are available on this page for every object type:
 - By Name
 - By Assessment Type
 - By Dimension
 - By Description
 - By Unique ID
 - By state

Explore **Search Results**

Current Search Parameters: Object Types: Control; Keywords: none

Filters

By Name

By Assessment Type

By Dimension

By Description

By Unique ID

By state

By Key Control

C-37 Personal information is relevant to the purposes for which it is to be used. **DRAFT**

ASSESSMENTS ▾

C-5 Payments within accounts payable designated as blocked are not able to be processed. **DRAFT**

ASSESSMENTS ▾

C-32 Post-implementation reviews are performed to verify that controls are operating effectively. **DRAFT**

ASSESSMENTS ▾

C-38 The entity's privacy policies address the disclosure of personal information to third parties. **DRAFT**

ASSESSMENTS ▾

C-30 Changes to specifications are approved by end-user management. **DRAFT**

ASSESSMENTS ▾

C-46 Travel and entertainment expenses are audited or reviewed on a sample basis. **DRAFT**

The Search Results page.

- Apply additional filters as needed. These additional filters are based on any plain text, select list, and multi-select fields added to the object type:
 - If you're adding a select list or multi-select list filter, choose one or more options from the dropdown menu.
 - If you're adding a plain text filter, enter one keywords into the text box. All special characters, except the @ and ! symbols, will be ignored.
- Click an object to view it. If the object was previously assessed, click the **Assessments** link to display instances of the object, then click the **instance** to view it.



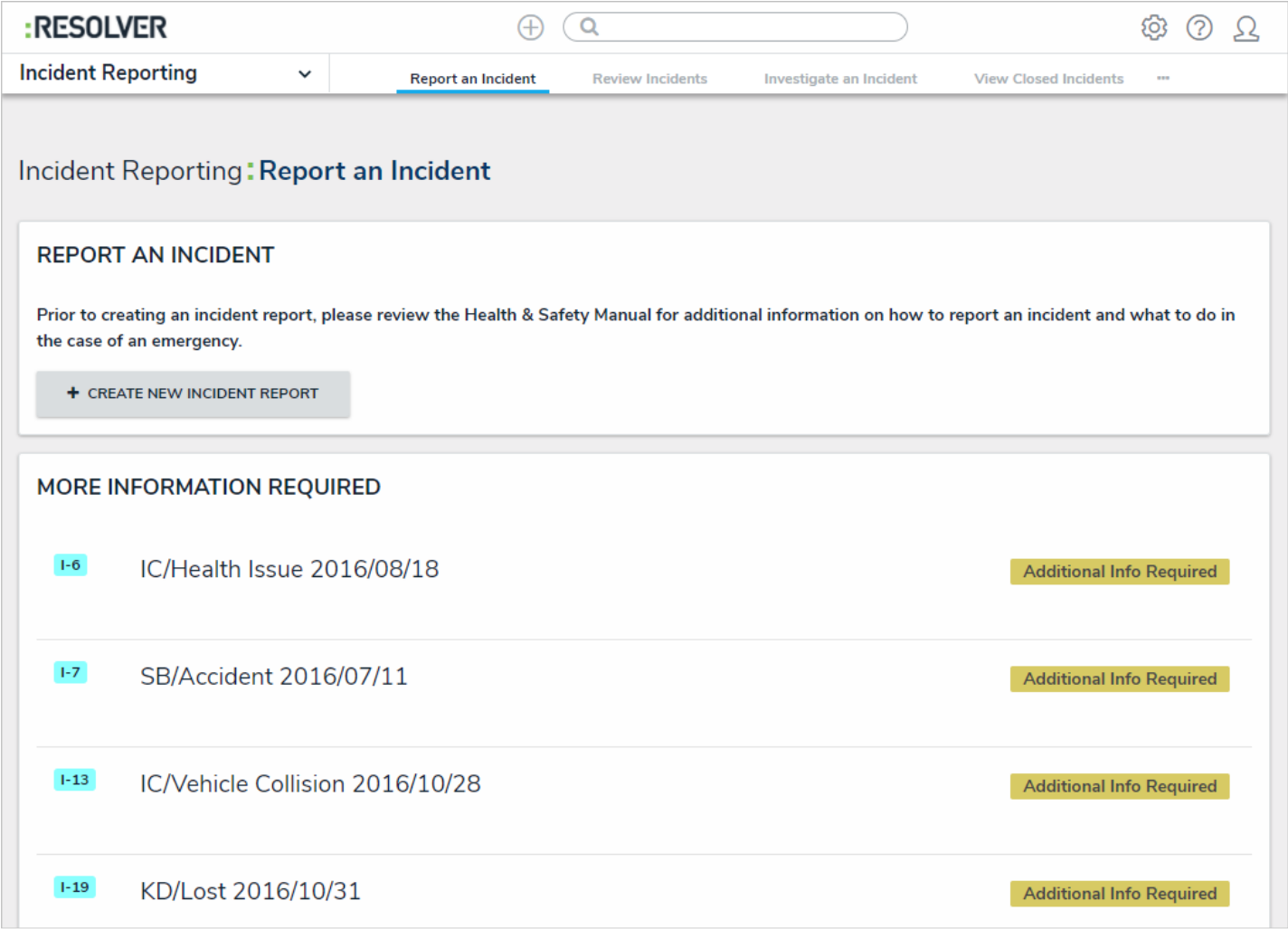
If an object has not been previously assessed, it will not have any instances and the **Assessments** link will be hidden by default.

About Applications Overview

Core is designed to help you collect and analyze data for several scenarios or circumstances. To do so, a data structure and workflow must be in place to ensure data is effectively collected, filtered, assigned, reviewed, and analyzed through one or more applications.

Applications and object type workflows control the movement of the data and are created when object types, object type groups, assessments, fields, configurable forms, and roles come together to make [activities](#) , which is where a user must perform a task ([actions](#)) or view objects or reports ([views](#)).

Access to applications and its activities is granted through a user's [role](#) permissions. Once permission is granted, users can view the applications and activities through the [nav bar](#) .



An application displaying one of its activities. Additional activities are accessible by clicking the tabs in the nav bar.

Recommended Process for Creating Applications

To create an application as quickly and easily as possible, Resolver recommends that administrators follow the process outlined below:

1. Create **users** , **user groups** , and **roles** .
2. Create an **application** .
3. Create an **activity** : Enter the activity's name and description.
4. Create **object types** : Enter the object type's name(s), description, and configure its monogram and icon.
5. Create **object type groups** : Enter the group's name(s), then edit the group to add related object types.
6. **Configure the object types**: Add **fields** , **relationships**, **formulas** , **roles** , and **inferred permissions** , and configure the **workflow states** , triggers, transitions, conditions, and actions.
7. **Add object types to roles** : Configure the workflow permissions for each state on each object type added to the role.
8. Create **configurable forms** for the object types.
9. Configure the activities' **actions** , **roles** , and **views** .

The steps to complete the above process are discussed in detail the remainder of this guide.

Object Types Overview

Object types are the containers for the data entered into Core and are the foundation of the entire system.

Object types determine the category of data that's collected and exactly what kind of data is entered. After an object type has been created, it can be associated with [configurable forms](#) , [applications](#) , activities, tasks, and [reports](#) . Records saved within an object type are known as **objects**.

Administrators define what appears on the object type by adding [fields](#) , [relationships](#) , [formulas](#) , and [roles](#) , which are components. Components need to be added so they can later be selected to appear on the configurable forms created for the object type, alongside the object's [properties](#) . If needed, these components can be used to create [concatenations](#) that use custom expressions to auto-populate the **Name** and **Description** properties on an object.

The data collection process for each object type is defined through a [workflow](#) , while the privileges a user has when working with the object type is specific in their role's [workflow permissions](#) .

Create Incident

Create a New Incident

Enter the type of incident, your initials and the date the incident was created in the Name field below. For example, *EL/Hazard 2016/10/26*

Incident Name

I-XXX

Incident

Creation

Select the employee who created the initial report.

Were there any witnesses? If yes, complete and submit a Witness Statement form.

WITNESS STATEMENT FORM

Location(s)

Date Updated

Dollar Value

A blank object type displayed through a configurable form. Through this form, users can enter, edit, and view data (depending on their permissions).

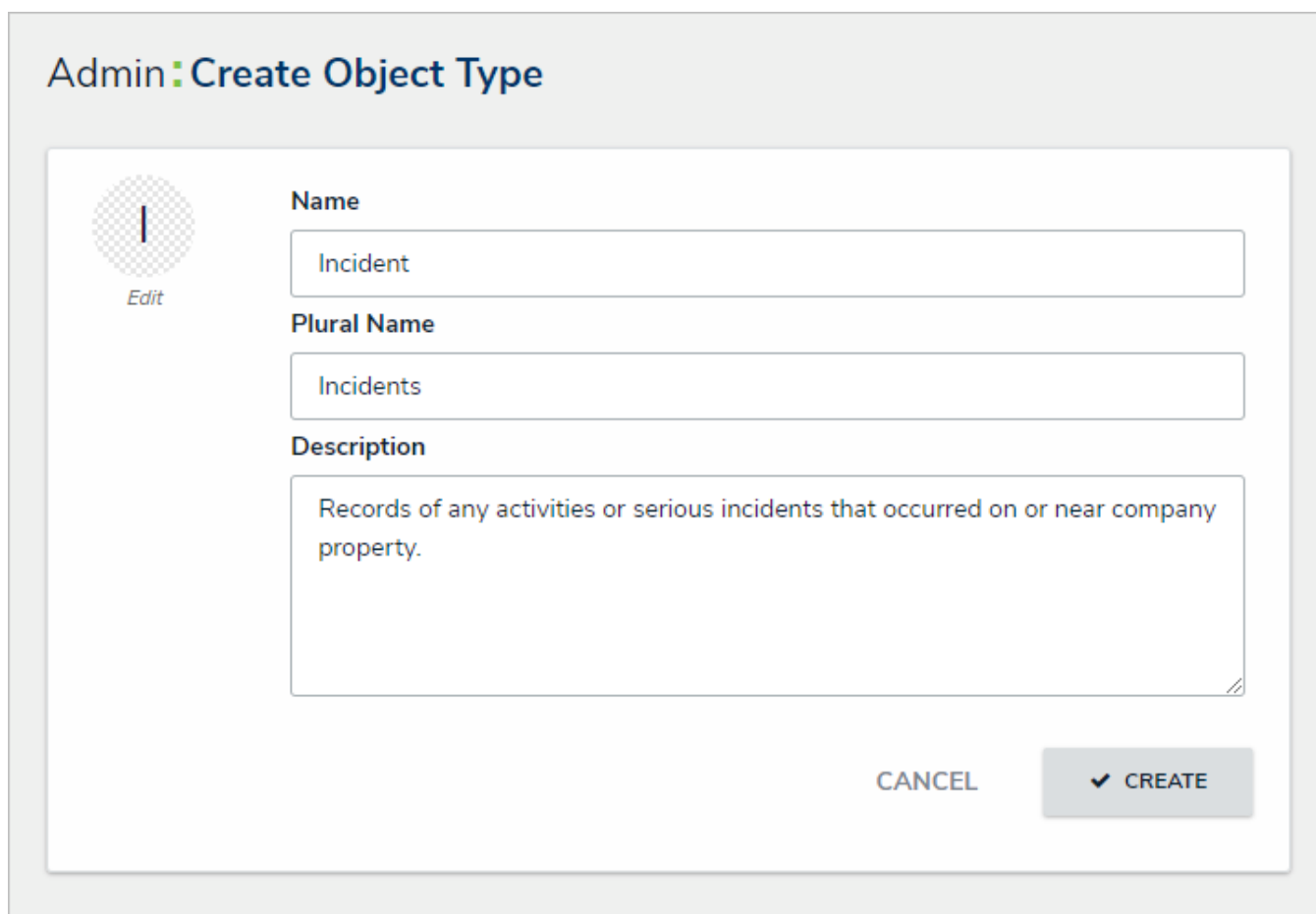
Components and workflows are configured through the **Edit Object Type** page, which has a number of tabs with information and configurable settings, including:

- **Overview:** A list of any [configurable forms](#) or report [data definitions](#) associated with the object type.
- **Fields:** Allows you to create, add, and edit [fields](#) on the object type as well as displays a list of the previously added fields.
- **Formulas:** Allows you to create, add, and edit [formulas](#) on the object type as well as displays a list of the previously added formulas.
- **Relationships:** Allows you to create, add, and edit [relationships](#) on the object type as well as displays a list of the previously added relationships.
- **References:** Displays a list of [references](#) on the object type.
- **Roles:** Allows you to add and configure [roles](#) on the object type as well as displays a list of the previously added roles.

Create a New Object Type

To create a new object type:

1. Click the  icon in the top bar > **Object Types** in the **Data Model** section.
2. Click **Create Object Type**.
3. Enter a name for the object type in the **Name** field.
4. **Optional:** Enter a plural name for the object type, which will appear when viewing a list of the objects for that type (e.g. “View Incidentss” instead of “View Incident”).
5. **Optional:** Enter a description of the object type, which will appear on the **Edit Object Type** page when editing the object type.



Admin : Create Object Type


Edit

Name
Incident

Plural Name
Incidents

Description
Records of any activities or serious incidents that occurred on or near company property.

CANCEL

The Create Object Type page.

6. **Optional:** To customize the object type monogram:
 - a. Click the monogram icon to the left of the **Name** field.
 - b. Enter 1 to 3 characters in the **Monogram** field.
 - c. Click the **Pick a color** dropdown menu to reveal the color picker. You can also type a hex color into this field to select a color.

Customize Monogram

Monogram

I

Pick a color

 #9ffff

✓ DONE

The Customize Monogram screen.



The monogram is used to help you quickly identify an object type throughout CORE. If you're creating multiple similar object types (e.g. Incidents and Incident Review) you may want to apply the same or similar colors to their monograms to help create a theme.

d. Click **Done**.

7. Click **Create** to display **Edit Object Type** page.

INCIDENT



Records of any activities or serious incidents that occurred on or near company property.

WORKFLOW

 [CONFIGURE WORKFLOW](#)

CONCATENATIONS

 [CONFIGURE NAME CONCATENATION](#)

 [CONFIGURE DESCRIPTION CONCATENATION](#)

Overview

Fields (0)

Formulas (0)

Relationships (0)

References (0)

Roles (0)

Summary information about the Object Type: related forms, object type groups, activities / applications, Reports, report definitions...

Related Forms

Related Data Definitions



✓ DONE

A new object type. By default, new object types do not have any workflows, concatenations, or components.

Add Fields to an Object Type

An object type's fields are where users will input data. Fields are available in the following formats:

- **Plain Text:** A text field that allows for a single line or multiple lines of text and optional concatenation. See the [Plain Text Fields](#) article for more information on concatenation.
- **Numeric:** A field that allows for numbers.
- **Date & Time:** A picker that allows you to select the date and time. All dates and times are saved and displayed in UTC format.
- **Select List:** A dropdown menu with multiple options to choose from.
- **Attachments:** An area on the form that allows users to upload files, insert links to websites, or both.
- **Image Attachment:** A field through which images can be uploaded and embedded onto a form.

All fields saved to an object type will appear on the object type's default form, but you can select which fields will appear on any [configurable forms](#) associated with the object type and you can add these same fields to multiple object types.



This section explains how to create and add fields to an object type, but you can also create fields, as well as edit and delete them, from the **Fields** settings. See the [Fields](#) section for more detailed information and instructions on each field type.

To add fields to an object type:

1. Click the  icon in the top bar > **Object Types** in the **Data Model** section.
2. Click the **Fields** tab.



The Fields tab with no previously added fields on the object type.

3. To create a new field to add to the object type:
 - a. Click **Add Field(s)** > **Add a New Field**
 - b. Select a field type from the **Field Type** dropdown menu.
 - c. Enter the field's details, including name, minimum and maximum number of characters, and any other settings as needed. If needed, provide additional information or instructions on completing the field in the **Long Name** section, which can be styled using [Markdown](#).

Create a New Field

×

Field Type

Numeric

Field Name

File Number

Long Name ?

Minimum Characters

e.g. 10, 140, etc.

Minimum Characters is optional. It must be a whole number less than or equal to Maximum Characters (if set).

Maximum Characters

e.g. 10, 140, etc.

Maximum Characters is optional. It must be a whole number greater than or equal to Minimum Characters (if set).

Number Type

Number

Normal number, currency, phone number, etc.

CREATE AND LINK

The Create a New Field screen, accessed from the Edit Object Type page.

- d. Click **Create and Link** to add the field to the object type.



See the [Fields](#) section for more detailed information about each field type and instructions on editing and deleting fields.

4. To add an existing field to the object type:

- a. Click **Add Field(s)**.
- b. Click one or more fields in the **Pick Fields to Add** section.

ADD A FIELD

PICK FIELDS TO ADD

+ ADD SELECTED (5)

+ ADD A NEW FIELD

✓ Additional Information Required

Plain Text field with multiple lines

✓ Address

Plain Text field with multiple lines

Adequate Segregation of Duties?

Select List field with 2 options

Assessment

Select List field with 5 options

✓ Attachments

Attachments field

Selecting existing fields to add to the object type.

c. Click **Add Selected**.

5. To edit a field, click it in the tab to open the **Editing Field** page.

6. To delete a field **from the object type only**, click the  icon.

7. Click **Done** when finished.

Add Formulas to an Object Type

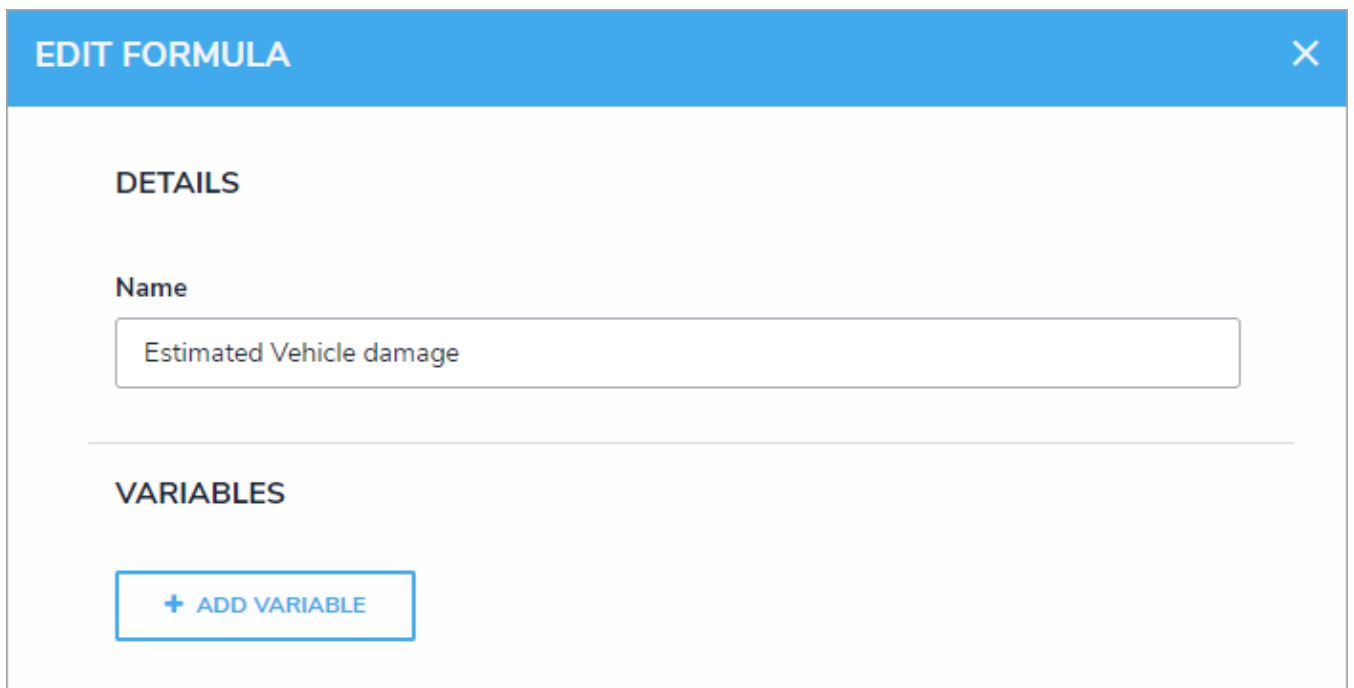
Formulas compile data from numeric and variable values to generate conclusions, such as Incident Severity, Estimated Damage, or Likelihood the Incident Will Recur, by displaying data on objects as a number, label (e.g. Low, Medium, High), both numbers and labels, or as a gauge, all with optional colors. Variable data is created from numeric data from other formulas, [select lists](#), [numeric](#) or [date](#) fields, or [workflow states](#) that are added directly to an object type or from object types associated through a [relationship](#) or [reference](#).

For more information on formulas, see the following articles:

- [Formulas Overview](#)
- [Variables, Operators & Functions](#)
- [Time Functions](#)
- [Null Values in Formulas](#)
- [Formula Examples](#)

To add a formula to an object type:

1. Click the  icon in the top bar > **Object Types** in the **Data Model** section.
2. Click the object type or enter the name of the object type in the **Search** field, then click it to display the **Edit Object Type** page.
3. Click the **Formulas** tab.
4. Click **Add Formula**.
5. Enter a name for the formula in the **Name** field (e.g. Estimated Vehicle Damage).
6. Click **Create**.
7. Click the new formula to open the **Edit Formula** palette.



The Edit Formula palette.

8. Click **Add Variable**.

9. Select either **Field**, **Relationship**, or **Reference** from the **Variable Type** dropdown menu.

- If you selected **Field**, choose a field or formula from the **Available Components** dropdown menu. The options in this dropdown are fields or formulas added directly to the object type.
- If you selected **Relationship** or **Reference**:
 - a. Select a relationship or reference saved to the object type from the **Relationship** or **Reference** dropdown menu.
 - b. Select a field, formula, or workflow state from the **Available Components** dropdown menu. These are the fields, formulas, or states saved to the object type(s) in the relationship or reference.
 - c. Select a variable sub-type from the **Sub Type** dropdown menu to specify how the data from multiple objects will be compiled, calculated, and displayed. See the [Variables, Operators & Functions](#) article for more information on the sub-types and relationship/reference variables.



Select lists can be used in formulas only if numeric values have been added to their options. See the [Select List Fields](#) article for more information.

10. **Optional:** If you wish to use a name other than the field's unique name, enter it in the **Name** field. Numbers, special characters, and spaces are not permitted.



Naming a variable after a function will result in an error.

11. **Optional:** Enter a description of the variable in the **Description** field, which will appear below the variable in the **Edit Formula** panel.

VARIABLES

+ ADD VARIABLE

BLUEBOOKVA

Field: Blue Book Value

RELATIONSHIP

ARRAY

X

FORMULA

SUM(BLUEBOOKVA)

↺

A formula entered in the Formula field using the variable name(s) (in this case, BLUEBOOKVA).

16. In the **Display** section, select either **None** or **Numeric** from the **Format** dropdown menu. If you selected **Numeric**, you can choose how the numbers will be displayed by clicking an option in the table to the left (i.e. **Num**, **%**, **0.00**, etc). A preview of the number format is displayed in the **Layout** field.

DISPLAY

Format

Layout

Num	%	\$	0.00
-Num	-%	-\$	-0.00

Range as

↺

Numeric[▼]

0

None[▼]

The display options for formulas. Selecting an option other than **None** in the **Range as** dropdown will reveal additional options.

17. Select an option from the **Range as** dropdown menu:
- **None:** The formula will display the numeric results only.
 - **Label:** The formula will display the range labels only (e.g. Low) in the color selected for that range.
 - **Label and Result:** The formula will display the numeric results and labels (e.g. Low – 1000) in the color selected for that range.
 - **Result:** The formula will display the numeric results only in the color selected for that range.
18. If you selected any option other than **None** in the **Range as** dropdown menu above, formula labels of **Low**, **Medium**, and **High** are automatically created. To configure the labels:
- Click the  icon next to the range you want to edit.
 - Click the **Color** dropdown menu to reveal the color picker and select a new color for the label. You can also type a hex color into this field to select a color.

- c. Enter a new name for the label in the **Label** field.
- d. Enter a numeric maximum value in the **Max Value** field.
- e. Click the  to save your changes.
- f. To delete a range, click the  icon.
- g. To add a new label, click **Add Label**, then follow steps b-e above.

 Low everything up to, and including, 5000	 
 Medium above 5000; up to, and including, 15000	 
 High above 15000; up to, and including, 25000 and above	 

ADD LABEL

The default formula labels.

- 19. Click **Done**.
- 20. To edit the formula, click it in the tab to open its settings.
- 21. To delete the formula, click the  icon.
- 22. Click **Done** when finished.



If changes are made to the display of an existing formula, you must click **Reformat Formulas** from the **Edit Object Type** page before those changes are displayed.



Clicking **Recalculate Formulas** recalculates **all** the formulas in your organization. As such, this action should be performed only when required.

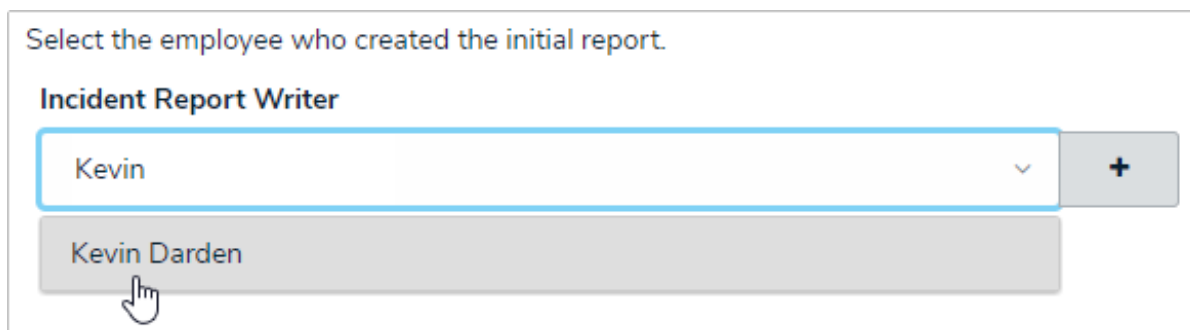
Add Relationships to an Object Type

You can connect two or more objects together by adding object types to an [object type group](#) , then adding that group to a relationship on another object type (e.g. the Visitor and Employee Record object types in a People Involved relationship saved to the Incident object type). Once a relationship is created, it will appear either as field or table on a [configurable form](#) for the object type the relationship is saved to, where administrator's can allow users to select an existing object or create a new one on the object type(s) added to the group, which then forms a relationship between the two objects.

Depending on the permission structure of the [roles](#) granted access to this object type, you will likely need to configure the [inferred permissions](#) to ensure users will have access to the object type(s) in the relationship, as required.

EXAMPLE

If you had an Incident object type and an Employee Record object type, you may want to link those object types together to track which employees created new incident objects. To do this, you create a new object type group called “Employees” and add Employee Record as the related object type. You would then use the Employee object type group to create a relationship on Incident, called “Incident Report Writer.” Once that relationship has been added, users can indicate which employee is creating the incident by selecting an existing Employee Record object or creating a new record from the Incident Report Writer field on the form.



Select the employee who created the initial report.

Incident Report Writer

Kevin

Kevin Darden

An example of how a relationship can be displayed on an object type. In this case, the Incident Report Writer field was created from a relationship on the Incident object type using the Employees object type group.

References are automatically created with relationships, but they don't appear on an object type until the **References** element has been added to a [configurable form](#) . See [Add References to an Object Type](#) for more information.



You cannot create a new object through a relationship on an object that hasn't transitioned out of the Creation state as the object has not yet been created and saved.

To add a relationship to an object type:

1. If not already created, create an [object type group](#) that includes the object type(s) you wish to add to the relationship.
2. Click the  icon in the top bar > **Object Types** in the **Data Model** section.
3. Click the object type you wish to add a relationship to or enter the name of the object type in the **Search** field, then click it to display the **Edit Object Type** page.
4. Click the **Relationships** tab.
5. Click **Add Relationship**.
6. Enter a name for the relationship as it will appear on the forms in the **Relationship Name** field (e.g. Incident Report Writer).
7. **Optional:** Enter a reference name in the **Reference Name** field, which will appear as a field if references are added to a [configurable form](#) . See [Add References to an Object Type](#) for more information.
8. **Optional:** If needed, provide additional information or instructions on completing the field in the **Long Name** section, which can be styled using [Markdown](#) formatting. If a long name is provided, you can choose to display it on a [configurable form](#) above the the relationship or reference elements to provide more information to end users.
9. Select an object type group from the **Object Type Group** dropdown menu.

Create a New Relationship ✕

Relationship Name

Reference Name

The Reference name is the reverse of the relationship name (e.g. Witness > Witnessed). It will be used when a relationship is displayed as a reference on an object type form.

Long Name

The Long Name is optional and can be used in select parts of the application to provide a more detailed question to the user.

Object Type Group

Employees

Adding a relationship to an object type.

10. Click **Create**.
11. To edit the relationship, click on it from the **Relationships** to open its settings.
12. To delete a relationship, click the  icon, then **Yes** to confirm.

Add References to an Object Type

References indicate that an object is connected to another object through a relationship. References are automatically created at the time a relationship is created, but they cannot be viewed on an object until the [References element](#) has been added to a configurable form.

Depending on the permission structure of the roles granted access to these object types, you will likely need to configure the [inferred permissions](#) to ensure users will have access to object type in the reference, as required.

EXAMPLE

Because you [created a relationship](#) on the Incident object type using the Employee group (which has the Employee Record object type added to it), you have the option of adding the References component to any configurable forms you create for Employee Record, which will display the incident records an employee created.

Employee Record Review

Kevin Darden

Employee Record Name

Kevin Darden

Hire Date



Seniority

Sr. Manager



Contact Information

Title

Mr.

Phone Number

5555551234

E-mail

k.darden@example.com

Address

1234 Street Avenue
Edmonton, Alberta, A01 1A0

DOB



March 17, 1970



This employee is a report writer on the following incidents:

KD/Lost 2016/04/02

KD/Emergency 2016/07/03

A reference on a configurable form displaying custom text.

When creating a [relationship](#), the name entered in the **Reference Name** field will determine which text will appear over the reference on a configurable form. If you don't enter anything in the **Reference Name** field, the reference will appear as **[Object type name] is a [relationship name] on:** If you entered a long name for the [relationship](#), you may also display the long name over the reference on a form.

Kevin Darden is a Report Writer on:

KD/Lost 2016/04/02

KD/Emergency 2016/07/03

The default reference description appearing a configurable form.

You can view the references on an object type by clicking the **References** tab from the **Edit Object Type** page. Clicking on a reference in this tab will show the **Edit Object Type** page for the other referenced object type.

Add Roles to an Object Type

Roles control the data a user can create, edit, delete, view, or manage on object types and objects. Once the role component for a specific role is added to an object type, it can be added to a configurable form, where you can grant users from within that role permission to view a [specific object](#). Where necessary, roles allow users to see additional object types related through relationships or references by granting [inferred permissions](#).



As users with global permissions can automatically view all the objects saved to the object type(s) specified in the role (subject to any workflow permissions), you can only add roles with explicit permissions to an object type.

What the users within a role can do with the object types and objects, including those accessed through inferred permissions, is controlled by the object type's [workflow permissions](#) on their role.

Roles must be created and configured before they can be added to an object type. See the [Roles](#) chapter for more information.

To add a role to an object type:



1. Click the icon in the top bar > **Object Types** in the **Data Model** section.
2. Click the object type or enter the name of the object type in the **Search** field, then click it to display the **Edit Object Type** page.
3. Click the **Roles** tab.
4. Click **Add Role**.
5. Click to select one or more roles under **Select Roles to Add**



Selecting roles to add to an object type.

6. Click **Add Selected**.

7. To add inferred permissions to the role:



Granting inferred permissions requires additional configurations on the role. See the [Inferred Permissions](#) section for more information on how these permissions work and how to configure the role.

- Click the role in the **Roles** tab to open **Edit Role Permissions**.
- Click the monogram, which represents the object type you're currently working in, to expand the node and reveal any relationships and references saved to the object type.
- Click a relationship or reference to show the object types associated with that relationship or reference (e.g. clicking People Involved will show the People and Employee Record object types).
- Click an object type to grant inferred permissions to that object type.

EDIT ROLE PERMISSIONS

INFERRED PERMISSIONS

Inferred permissions will cascade the role permissions defined for all object types selected when a user is assigned to the role via an object.

Define Permission Path

- ☒ **I** Incident ✓
 - ☒ People Involved
 - ☒ **P** Person ✓
 - + Person (Reference)
 - + Drivers (Reference)
 - + People Involved (Reference)
 - + Involvements (Reference)
 - ☒ **ER** Employee Record ✓
 - + This employee is a report writer on the following incidents: (Reference)
 - + Person (Reference)
 - + Drivers (Reference)

Granting inferred permissions. The checkmarks next to the P (People) and ER (Employee Record) monograms confirm that users in that role have access to those object types through the I (Incident) object type.

- Click **Done**, then **Continue** to confirm.
8. To edit the role's inferred permissions, click the role in the tab to open **Edit Role Permissions**.
9. To delete the role **from the object type only**, click the icon.

10. Click **Done** when finished.

Object Properties

Properties are auto-created components that display an object's default information. Properties can be displayed on a [configurable form](#) or in an [email template](#). They include:

- **Name:** The title of the object, which helps identify the object in [views](#) or [search](#) results. The header of this property appears on forms as [Object Type] Name (e.g. Incident Name).



The **Name** property should be included on all your standard forms as it's used to identify objects in search results, views, reports, relationships, etc. If this property is not added to your forms, users will not be able to search for and select existing objects in relationship fields or tables.

- **Description:** A description of the object.
- **Unique ID:** The unique identifier automatically assigned to the object type at the time of creation.
- **Monogram:** The letter(s) and color assigned to the object type.
- **Created By:** The user who created the object.
- **Created On:** The date the object was created.
- **Modified By:** The name of the user who last modified the object.
- **Modified On:** The date the object was last modified.
- **Workflow Status:** The current state of the object.
- **Assessment Dimension:** Adds read-only [dimension](#) data onto the form of objects that were referenced on an assessment. If an object has not been referenced on an assessment, the property will be invisible.

Name & Description Concatenation Overview

Concatenation pulls data from [properties](#) and [fields](#) to automatically populate the **Name** and/or **Description** properties of objects. This feature is useful for ensuring important information is captured in an object's name or description and to ensure object names and descriptions are consistent across the org.



Concatenation can also be added to plain text fields. See the [Plain Text Fields](#) article for more information.

To specify which data is populated in the Name and/or Description properties, administrators edit an object type, select a related [data definition](#) and an object type in that definition, then one or more properties or fields to create variables (similar to a [formula variable](#)), which are then used to create an expression. For example, if you created variables for the City and Address plain text fields, your expression would look similar to {{{City}}}, {{{Address}}}.

If the data definition includes additional object types related through [relationships](#) or [references](#), you can create variables from those object types to include in the expression, which will display specific field or property data from the relationship or reference elements on the form. For example, creating a variable for the Name property on the Person object type, which is related to the Incident object type through a relationship, means that when a person is selected as witness on an incident, that person's name will be automatically populated in the incident's Name property.

EXAMPLE

When reporting incidents, your company requires that each object's name is automatically generated based on the object's unique ID, the date it was created, and the incident code. Additionally, the description of each object must display where the incident occurred, what type of incident it was, and who created the object. As such, you create variables for the Incident object type's Unique ID property, the Incident Type Code select list, and the Created On property, then add them to the expression for the Name Concatenation option on the Edit Object Type page. For the Description Concatenation, an expression is created using the Location and Incident Type select lists and the Created By property. Now, when an end user creates a new incident, the object's name and description is populated based on the variables and expressions saved to the concatenation settings.

Admin: Edit Object Type

INCIDENT



Records of any activities or serious incidents that occurred on or near company property.

WORKFLOW

 [CONFIGURE WORKFLOW](#)

CONCATENATIONS

CONFIGURE NAME CONCATENATION

{{[UID]}}: {{[IncidentTypeCode]}} / {{[CreatedOn]}} 

CONFIGURE DESCRIPTION CONCATENATION

{{[Location]}} / {{[IncidentType]}} / {{[CreatedBy]}} 

The Concatenations settings on the Edit Object Type page with saved expressions.

Incident Review

75: 01-03 / 2017-09-29

Description

Montreal / Emergency / Eva Lockett

I-75

Incident Type

Emergency

Incident Type Code

01-03

Location

Montreal

EXPORT INCIDENT OBJECT DATA

CREATE A WITNESS STATEMENT

An incident object with Name and Description concatenation expressions applied. In this case, the object's name is populated by the unique ID (75), Incident Type Code (01-03), and Created On (not shown on the form). The description is populated by the Location (Montreal), Incident Type (Emergency), and Created By (not shown on the form).

Prior to creating expressions, you must ensure the fields you want to include in the variables have been [added](#) to the object type and have or will be added to the relevant [configurable form](#). The **Unique ID**, **Created By**, and **Created On** properties do not need to be added to the form as they are auto-generated and cannot be modified, however, because expressions override any values entered into an object's **Name** or **Description** properties upon saving a new object, it's recommended these properties are **not** added to a configurable form.



Concatenations **cannot** be applied to existing objects.



[Custom form title](#) take precedence over any **Name Concatenation** expressions.

Add Name or Description Concatenations to an Object Type

To add name or description concatenations to an object type:

1. Ensure the [fields](#) you wish to include in the concatenation(s) have been added to the object type and appropriate [configurable form](#). If the concatenation will be pulling data from other object type(s), ensure the appropriate [relationships](#) and [references](#) have been added to those object types, along with the relevant fields. See the [Concatenation Overview](#) article for more information.
2. Ensure the data definition you wish to use to filter the data has been created from the [Data Definitions](#) settings in **Administration**.
3. Click the  icon in the top bar > **Object Types** in the **Data Model** section.
4. Click the object type or enter the name of the object type in the **Search** field, then click it to display the **Edit Object Type** page.
5. Click either **Configure Name Concatenation** or **Configure Description Concatenation** to open the **Edit Concatenation** palette.
6. Select a data definition from the **Data Definition** dropdown menu. This will determine which object types' properties and fields are available to add as variables.

EDIT CONCATENATION

DETAILS

Data Definition 

Incident Only

VARIABLES

+ ADD VARIABLE

EXPRESSION

Variables must be wrapped in triple braces. Eg: {{{VARIABLE1}}}-{{{VARIABLE2}}}

SAVE EXPRESSION

A new concatenation with no variables or expression.



If you want to select another data definition, you must delete the concatenation by clicking the **X** icon beside the concatenation on the **Edit Object Type** page, then recreate it.

7. Click **Add Variable**.
8. Select an object type in the data definition from the **Select Object Type** dropdown menu.
9. Select a property or field you want to auto-populate in an object's name or description. For example, selecting the **Created By** property will auto-populate the name of the user who created an object. If you selected the **Created On** property or **Date** field, select a date format (e.g. YYYY-MM-DD) from the **Variable Format** dropdown menu.
10. Enter a name for the variable in the **Variable Name** field. Spaces and special characters are **not** permitted.
11. **Optional:** If you want a default value to populate in the concatenation when the variable has no data, enter that value in the **Default Value** field (e.g. "Null" or "None provided").
12. If the variable has been created from a component on the same object type where the concatenation is saved (e.g. the Incident Name property is being saved to an expression on the Incident object type) select the **Self** checkbox.

VARIABLES

Select Object Type

Incident

Available Component

Property: Created By

Variable Name

CreatedBy

Default Value

☒ Self

ADD

CANCEL

Creating a new variable in the Edit Concatenation palette.

13. Click **Add** to save the variable.

VARIABLES

CreatedBy

Property: Created By

+ ADD VARIABLE

A new variable, which can be included in the concatenation expression.

14. Repeat steps 7-13 above to continue adding variables as needed.
15. Type the variable names in the **Expression** field. Variables can be entered in any order, but they must be enclosed in triple curly braces (e.g. {{{CreatedBy}}}). If needed, you can include spaces and other alphanumeric characters between the variables.

EXPRESSION

{{{DateSubmitted}}} - {{{IncidentType}}} - {{{CreatedBy}}}

Variables must be wrapped in triple braces. Eg: {{{VARIABLE1}}}-{{{VARIABLE2}}}

SAVE EXPRESSION

An expression with variables. All variables must be enclosed in triple curly braces.

16. Click **Save Expression**.

CONCATENATIONS

CONFIGURE NAME CONCATENATION

{{{DateSubmitted}}} - {{{IncidentType}}} - {{{CreatedBy}}}

CONFIGURE DESCRIPTION CONCATENATION

The new expression saved to the object type and displayed on the Edit Object Type page.

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17. To edit a variable, it must be deleted by clicking the  icon from the **Edit Concatenation** palette, then recreated.
18. To delete the concatenation, click the  icon from the **Edit Object Type** page.

Incident Review

2017-10-02 - Health issue - Eva Lockett

Description

I-85

Incident Type

Health issue

Incident Type Code

01-04

Location

New York

Date of submission

October 2, 2017

EXPORT INCIDENT OBJECT DATA

CREATE A WITNESS STATEMENT

The expression displaying successfully on an incident object.

Edit or Delete a Concatenation

Data definitions and variables on concatenations cannot be edited, however, you can delete the concatenation to select a new definition and create new variables. To do so, open the **Edit Object Type** page, then click the  beside the concatenation.

Note that deleting the concatenation will delete all associated variables. To delete a single variable, click **Configure Name/Description Concatenation** on the **Edit Object Type** page, then click the  icon beside the variable in the palette.

VARIABLES

CreatedBy

Property: Created By



DateSubmitted

Field: Date of submission



IncidentType

Field: Incident Type



Deleting a variable in the Edit Concatenation palette on the Edit Object Type page.

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Edit or Delete an Object Type

To edit or delete an object type:

1. Click the  icon in the top bar > **Object Types** in the **Data Model** section.
2. Click the object type or enter the name of the object type in the **Search** field, then click it to display the **Edit Object Type** page.
3. To edit the object type's name, description, or monogram, click the  next the object type's name at the top of the page.
4. Click the tabs to edit or delete the components added to the object type.
5. To delete the object type, click the  icon.

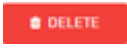


If any data has been saved to or associated with the object type, it's strongly recommended that you **do not** delete it. Additionally, you will not be able to delete an object type until all its objects have been [deleted](#).

6. Click **Done** when finished.

Delete an Object

Depending on the [role permissions](#) , both administrators and end users can delete objects, however, before the object can be deleted, you will need to review the **Deletion Request** warning, which outlines how deleting the object will impact other objects that are connected through relationships or references.

To delete an object, open the object record, click the  icon, review the **Deletion Request**, then click  to confirm.



Deleting an object that's has relationships or references will delete that object's connection to the other objects, but it will **not** delete the other objects it was related to.

Deletion Request

Please review the impact of the delete prior to the deletion

HP/Accident 2016/11/15 has 9 direct relationships

HP/Accident 2016/11/15 is referenced in 5 places

CANCEL

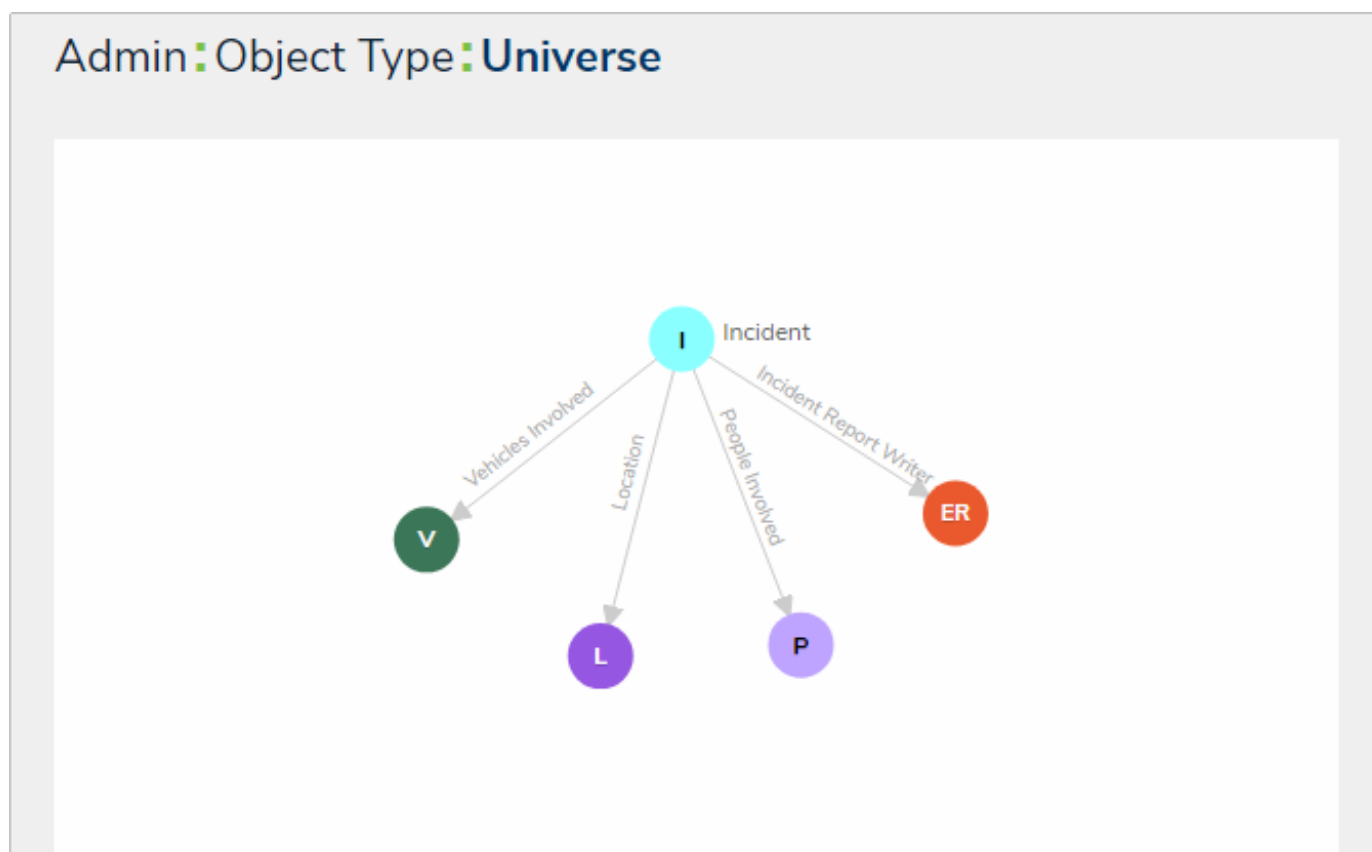
DELETE

The Deletion Request warning that outlines how deleting the object will affect other objects that are connected through relationships or references.

Object Type Universe

The **Object Type Universe** graph helps you visualize how all the object types in your org are associated with one another through [relationships](#).

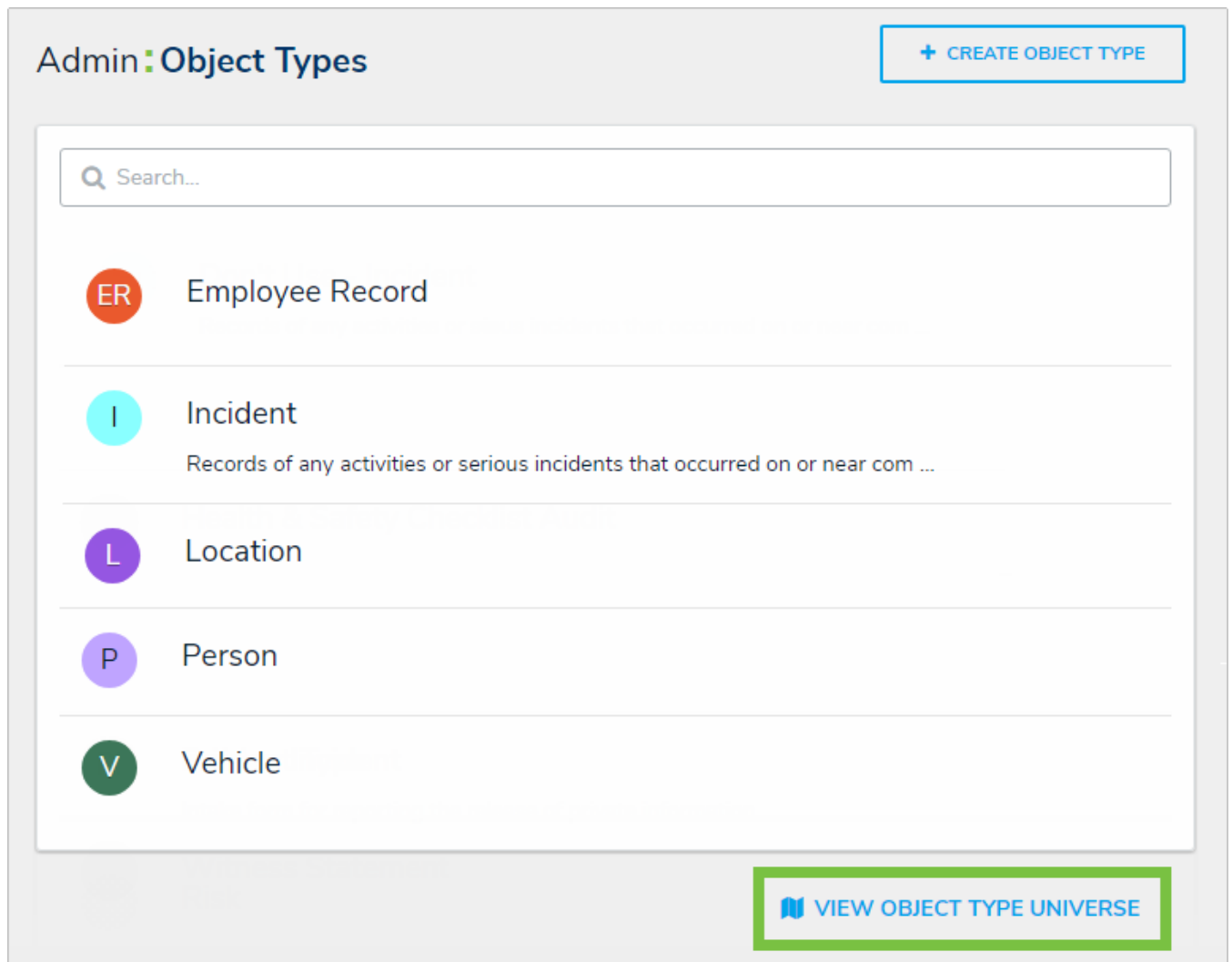
You can reveal the name of an object type by hovering your cursor over the monogram. The gray arrows indicate which object type the relationship is saved to. For example, in the screenshot below, the Incident object type is associated with the Vehicle object type through a “Vehicles Involved” relationship.



The Object Type Universe graph.

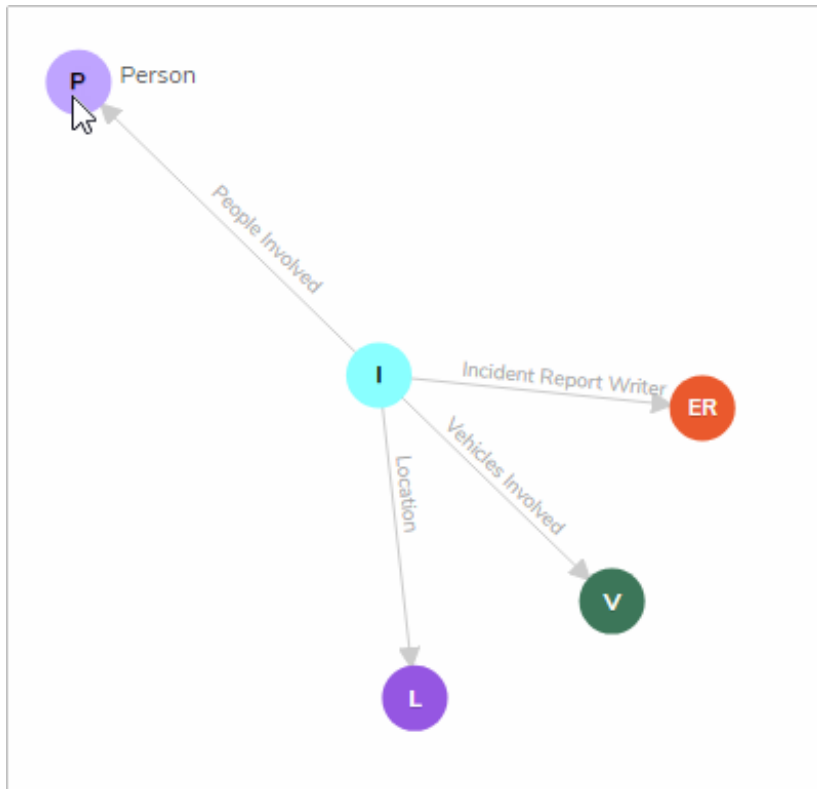
To view the Object Type Universe graph:

1. Click the  icon in the top bar > **Object Types** in the **Data Model** section.
2. At the bottom of the **Object Types** page, click **View Object Type Universe** to display the graph.



The Object Types page, displaying the View Object Type Universe link at the bottom of the page.

3. To rearrange the location of a single object type or a cluster of object types, click and drag it to a new location on the graph.



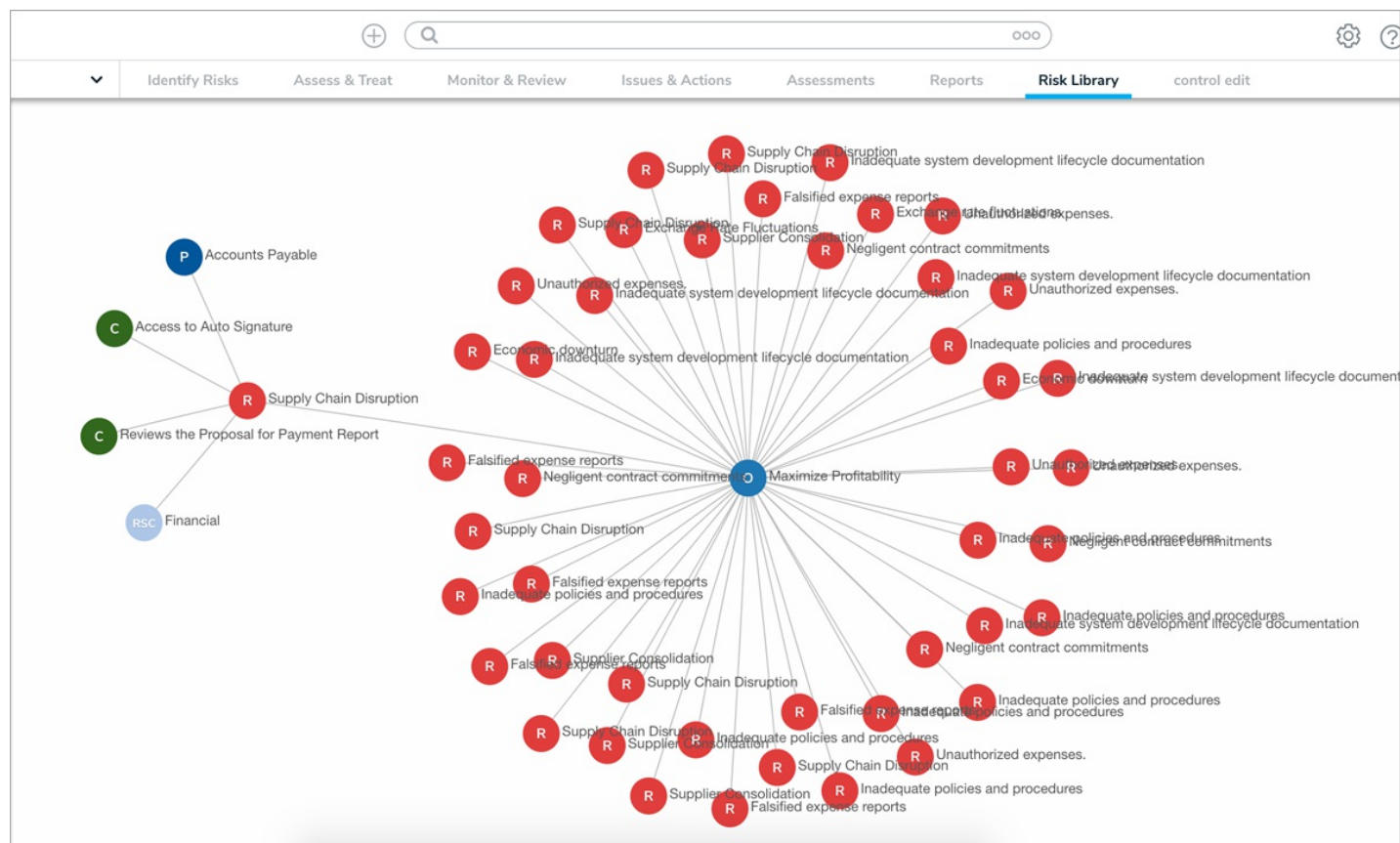
Clicking and dragging a cluster of object types to a new location on the graph.

4. Click an object type on the graph to view its **Edit Object Type** page.
5. Click the back button on your browser when finished to return to the **Object Types** page.

Relationship Graphs

An object's relationship graph shows how that object is connected to other objects in your organization through [relationships](#) , [references](#) , and [assessments](#) . Clicking an object will open it for further review. To access the relationship graph, click the **View Relationship Graph** link at the bottom of any object.

Your role's [workflow permissions](#) control which objects appear in the graph and the form that's displayed when an object is clicked and opened.



A relationship graph. Clicking an object will open the record.

If you're an administrator, you view a similar graph that shows relationships between object types in your organization. See [Object Type Universe](#) for more information.

Library Objects & Object Types

Throughout Core, you may see references to **library objects** or **library object types**. Generally speaking, these references are used to differentiate standard object types and their data from [assessment types](#). Note, however, that this definition may vary depending on your specific implementation or app.

Inferred Permissions Overview

Inferred permissions allow you to give users with explicit permissions access to additional object types through [relationships](#) and [references](#) without directly granting permission through the [role field](#) on a configurable form. This ensures users within a particular role with explicit permissions are indirectly given the appropriate access to the information they need when interacting with related objects.

EXAMPLE

Hollie Peel is part of the Incident Editor role with explicit permissions. When working with existing incident objects, she may need to edit information about the people who were involved in an incident through the People Involved relationship, so she needs access to the Incident object type, as well as the Person and Employee Record object types. Therefore, the Incident, Person, and Employee Record object types are added to the Incident Editor role. After the role is configured, it's saved to the Incident object type as a component and is then configured to grant inferred permissions to the Person and Employee Record object types through the People Involved relationship. Once Hollie has been given access to an incident object (by being added to the Incident Editor role field on a form), she can edit the objects in the People Involved relationship without being granted direct access to People and Employee Record objects by another user.

Granting users inferred permissions is done using the following process:

1. Create a [role](#) .
2. Add the object types the user will have access to, including those accessed through inferred permissions, to the role.
3. Edit the workflow permissions for the object types. The rights granted here will determine the rights the user will have when accessing the object types through inferred permissions.
4. [Add the role](#) to the object type that has the relationships and references saved to it.
5. Edit the role on the object type to [add inferred permissions](#) .

EDIT ROLE PERMISSIONS

INFERRED PERMISSIONS

Inferred permissions will cascade the role permissions defined for all object types selected when a user is assigned to the role via an object.

Define Permission Path

I

Incident✓

People Involved

P

Person✓

Person (Reference)

Drivers (Reference)

People Involved (Reference)

Involvements (Reference)

ER

Employee Record✓

This employee is a report writer on the following incidents: (Reference)

Person (Reference)

Drivers (Reference)

Granting inferred permissions. The checkmarks next to the P (People) and ER (Employee Record) monograms confirm that users in that role have access to those object types through the I (Incident) object type.

After the above steps have been completed, a user with **Manage** rights must add a user who belongs to the selected role to an object through the **role field** on a configurable form. Once added, the user will have access to the object and any selected related objects based on the inferred and workflow permissions.

Users who are logged in at the time their role's permissions are configured will need to log out then log back in before the changes are applied.

Inferred permissions don't apply to objects that haven't transitioned out of the **Creation** state as the object has not yet been created and any users added to a role have not yet been saved.

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Add Inferred Permissions on an Object Type

To add inferred permissions on an object type:

1. Click the  icon in the top bar > **Object Types** in the **Data Model** section.
2. Click the object type or enter the name of the object type in the **Search** field, then click it to display the **Edit Object Type** page.
3. [Add a role](#) to the object type.
4. Click the role in the **Roles** tab to open **Edit Role Permissions**.
5. Click the monogram, which represents the object type you're currently working in, to expand the node and reveal relationships and references saved to the object type.
6. Click a relationship or reference to show any object types associated with that relationship or reference (e.g. clicking People Involved will show the People and Employee Record object types).
7. Click an object type to place a checkmark next to it and grant inferred permissions to that object type.

EDIT ROLE PERMISSIONS

INFERRED PERMISSIONS

Inferred permissions will cascade the role permissions defined for all object types selected when a user is assigned to the role via an object.

Define Permission Path

I

Incident✓

People Involved

P

Person✓

Person (Reference)

Drivers (Reference)

People Involved (Reference)

Involvements (Reference)

ER

Employee Record✓

This employee is a report writer on the following incidents: (Reference)

Person (Reference)

Drivers (Reference)

The Permission Path in an object type's inferred permission settings.

8. Click **Done**, then **Continue** to confirm.



Inferred permissions can be edited by opening **Edit Role Permissions** on the object type, then selecting or deselecting the additional object types as needed.

Workflow Overview

Workflows allow administrators to control the movement of data as well as define what data is displayed, where it's displayed, and which users the data is displayed to through [applications](#) , activities, search results, [reports](#) , and [assignments](#) . Workflows are often used for processes, but can also be used to mark or flag certain objects (e.g. moving a Vehicle object into a Stolen state or a Person object into a Deceased state). Each object type must have a workflow.

Workflows are comprised of the following elements and are created in the order outlined below:

1. **States:** The various stages of the data collection process (e.g. Create, Triage, Review, Investigate, Close). You can create multiple states, but you must have at least two states in order to save an object. The **Creation**, **Draft**, **Active**, and **Archived** states are auto-created on every object type. When object types are added to roles, you must configure the [workflow permissions](#) for each state. Once created, workflow states can be used as variables in [formulas](#) and workflow **conditions**.
2. **Triggers:** The act that prompts the movement of an object from one state to another once a trigger is activated, which appears as button on a configurable form (e.g. clicking Create on a new Incident will move the object from the Creation state to Triage). The state an object moves to is determined by the transition saved to the trigger. Triggers may also include orchestration events, which move multiple objects into other states.
3. **Transitions:** Transitions are created on triggers and define the state the object will be moved to and any actions that will be taken (e.g. after a user clicks the Create trigger, the transition determines that the object is moved to the Triage state and an email notification is sent out to the managers who need to review it). You can create multiple transitions for each trigger.
4. **Conditions:** Conditions are added to transitions and determine which workflow state an object is moved to depending on whether certain parameters, based on variables from fields, formulas, or states, have been met (e.g. if an incident is flagged as "Injury Occurred" you can specify that the object is sent to the HR state, while other incidents that aren't flagged are moved through a standard triage workflow). You can also apply conditions to actions.
5. **Actions:** Actions are added to transitions to allow administrators to add an automated process to an object as it moves through its workflow states. Actions include sending an email or assigning users within a selected role, clearing fields, roles, relationships from an object, adding values to select list or date and time fields, or orchestration events, which move multiple objects into other states.

All new object types are saved with four auto-created states: [Creation](#) (the object's entry state), **Draft**, **Active**, and **Archived**. You can't delete the **Creation** state, but you can rename it and change or add additional triggers and transitions. You can edit or delete the other auto-created states, however, you **must** create another state for **Creation** to transition to.

Administrators can also create multiple workflows for object types that have been added to an assessment as dimensions. See [Configure Assessment Workflows](#) for more information.

EXAMPLE

You need to create a number of states, triggers, and transitions to ensure the Incident object type goes through the proper data collection and review process. To start, you create two states: Submit for Review and In Review. On the Submit for Review state, you create the Submit for Review trigger (which is the button the user can click on the configurable form to move the object to the next state) and on that trigger, you create the Submit for Review transition with an In Review destination state. This means that when a user clicks on Submit for Review, the Incident object is automatically moved to the In Review state.

States

+ ADD STATE

● CREATION

⚡ TRIGGERS

+ ADD TRIGGER

CREATION STATE

0 REQUIRED COMPONENTS

Create ⇄ Transitions to Draft

● DRAFT

⚡ TRIGGERS

+ ADD TRIGGER

0 REQUIRED COMPONENTS

Active ⇄ Transitions to Active

● ACTIVE

⚡ TRIGGERS

+ ADD TRIGGER

0 REQUIRED COMPONENTS

Archive ⇄ Transitions to Archived

● ARCHIVED

⚡ TRIGGERS

+ ADD TRIGGER

0 REQUIRED COMPONENTS

This State has no Triggers

The default workflow.

States

[+ ADD STATE](#)

CREATION

⚡ TRIGGERS [+ ADD TRIGGER](#)

CREATION STATE

0 REQUIRED COMPONENTS

Create ⇄ Transitions to In Progress



IN PROGRESS

⚡ TRIGGERS [+ ADD TRIGGER](#)

0 REQUIRED COMPONENTS

Submit ⇄ Transitions to Complete



COMPLETE

⚡ TRIGGERS [+ ADD TRIGGER](#)

0 REQUIRED COMPONENTS

This State has no Triggers

A custom workflow.

Edit the Workflow Name or Description

To edit the workflow name or description:

1. Click the  icon in the top bar > **Object Types** in the **Data Model** section.
2. Click the object type or enter the name of the object type in the **Search** field, then click it to display the **Edit Object Type** page.
3. Click the  icon next the workflow name near the top of the page.
4. Make your changes to the **Name** or **Description** fields as needed.
5. Click **Done** when finished.

Edit the Creation State

Creation is the first state in every object type's workflow and is automatically created. It cannot be deleted, nor can its name or color be edited, however, any added triggers, transitions, or actions can be edited or deleted. This state is automatically created with a trigger and transition that moves objects to the **Draft** state. This trigger and transition can be deleted, however, you must ensure a replacement trigger and/or transition is configured on **Creation**, otherwise new objects will not be created and saved.

The **Creation** state can be configured by following the instructions in the [Edit or Delete a State](#) (to add required components that must be completed before the object is completed), [Add a Trigger & Transition to a State](#), and [Edit or Delete a Trigger or Transition](#) sections.

STATES

+

ADD STATE

CREATION

⚡ TRIGGERS

+

ADD TRIGGER

CREATION STATE

0 REQUIRED COMPONENTS

This State has no Triggers

The Creation state, which appears on every object type. You can edit some of the settings of this state, but you cannot delete it.

Edit or Delete the Draft, Active, or Archived States

Like the [Creation](#) state, the **Draft**, **Active**, and **Archived** states are auto-created once an object type has been created, but you can edit or delete these states as needed. However, because the **Creation** state automatically transitions to **Draft**, you must ensure that the **Create** trigger has been set to transition to an alternate state if you choose to delete **Draft**. Failure to do so will prevent an object from being saved in the system.

You can edit or delete these states by following the instructions in the [Edit or Delete a State](#) , [Add a Trigger & Transition to a State](#) , and [Edit or Delete a Trigger, Transition, or Action](#) sections.

STATES

+ ADD STATE

● CREATION

⚡ TRIGGERS

+ ADD TRIGGER

CREATION STATE0 REQUIRED COMPONENTS

Create⇌ Transitions to Draft

● DRAFT

⚡ TRIGGERS

+ ADD TRIGGER

0 REQUIRED COMPONENTS

Active⇌ Transitions to Active

● ACTIVE

⚡ TRIGGERS

+ ADD TRIGGER

0 REQUIRED COMPONENTS

Archive⇌ Transitions to Archived

● ARCHIVED

⚡ TRIGGERS

+ ADD TRIGGER

0 REQUIRED COMPONENTS

This State has no Triggers

The default workflow that's auto-created with an object type.

Create a New State

States represent the various stages of the data collection and review process (e.g. Create, Triage, Review, Investigate, Close, etc.). States allow you to narrow down your search results, control where an object is created or viewed in an application, which fields must be completed during certain stages, and which state the object will transition to by adding triggers to the state. When a new object type is created, a default workflow state is created with it (which includes the **Creation**, **Draft**, **Active**, and **Archived** states). These states can be deleted or supplemented with additional states as needed (except for the **Creation** state, which cannot be deleted and allows for only limited configuration).

Once created, the new state will appear in the workflow, which you can then select when creating new [transitions](#) on other states. You can also select states to create **Relationship** or **Reference** variables in [formulas](#) or [workflow conditions](#), which can provide a count of the objects currently in the specified state or check if some or all of the objects are in that state and return a true or false result. You can select select states from the object type's workflow or any assessment workflows related to the object type.

To mark certain fields, properties, or roles as required when the object is in a particular state, or to change the state's name or color, see [Edit or Delete a State](#). To add triggers, transitions, or actions to your new state, see [Add a Trigger & Transition to a State](#).

To create a new state:

1. Click the  icon in the top bar > **Object Types** in the **Data Model** section.
2. Click the object type or enter the name of the object type in the **Search** field, then click it to display the **Edit Object Type** page.
3. Click **Configure Workflow** on the **Edit Object Type** page. If there are multiple workflows saved to the object type, click one in the list.
4. Click **Add State**.
5. Enter the state name in the **Name** field.
6. Click the **Color** dropdown menu to reveal the color picker and select a new color for the label. You can also type a hex color into this field to select a color.
7. Select a state category from the **State Category** dropdown menu to classify the new state.



Though the **State Category** field is required, full functionality of this feature will be available in an upcoming release.

8. Click **Create**.

STATES

Name

Information Requested

Color

#9556e2

State Category

In Progress

CANCEL

✓ CREATE

Creating a new state.

INFORMATION REQUESTED

⚡ TRIGGERS

+ ADD TRIGGER

0 REQUIRED COMPONENTS

This State has no Triggers

A new state. New states don't have any triggers or transitions saved to them, but new states can be selected on transitions on other states.

After clicking **Create**, your new state will appear in the workflow, below existing states. You can select this state when creating new transitions on other states. To add triggers, transitions, or actions to your new state, see [Add a Trigger & Transition to a State](#).

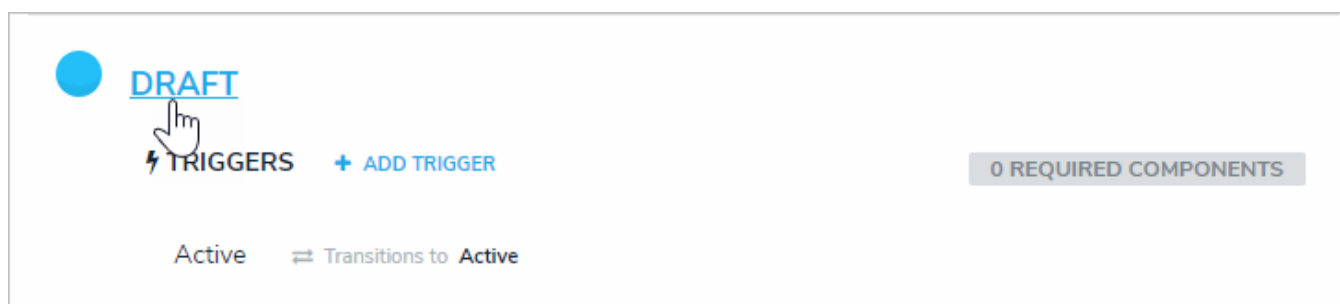
Edit or Delete a State

After you've created a state, you can edit it to change its name, color, or state category, as well as select the properties, components, or [roles](#) saved to the object type that must be completed before the object can transition to the next state.

Once created, the new state will appear in the workflow, which you can then select when creating new [transitions](#) on other states. You can also select states to create **Relationship** or **Reference** variables in [formulas](#) or [workflow conditions](#), which can provide a count of the objects currently in the specified state or check if some or all of the objects are in that state and return a true or false result.

To edit or delete a state:

1. Click the  icon in the top bar > **Object Types** in the **Data Model** section.
2. Click the object type or enter the name of the object type in the **Search** field, then click it to display the **Edit Object Type** page.
3. Click **Configure Workflow**. If there are multiple workflows saved to the object type, click one in the list.
4. Click the state you wish to edit to open the **Edit State** palette.



Clicking a state to open the Edit State palette.

5. If needed, enter an alternate name for the state in the **Name** field.

EDIT STATE

Draft

Name

Draft

Color

#0fc0fc

State Category

Draft

REQUIRED COMPONENTS

Select any Fields that must contain a value in order to move into the next Workflow State

Q Search...

Name	PROPERTY
Description	PROPERTY

DELETE STATE

The Edit State palette.

- Click the **Color** dropdown menu to reveal the color picker and select a new color for the label. You can also type a hex color into this field to select a color.
- Use the **State Category** dropdown menu to select an alternate category.
- If certain components must be completed or if a user from a particular **role** must be granted access to the object before it can move to the next state, select those components, properties, and/or roles in the **Required Components** section.

REQUIRED COMPONENTS

Select any Fields that must contain a value in order to move into the next Workflow State

Q Search...	
✓ Name	PROPERTY
Description	PROPERTY
People Involved	RELATIONSHIP
✓ Incident Report Writer	RELATIONSHIP
Suspect/Person Responsible	RELATIONSHIP

Selected fields and relationships in the Required Components section.



If you add required fields to a state, you must ensure these fields have been added to any applicable [configurable forms](#), otherwise users will not be able to view and complete the required fields to transition the object to the next state.

- To delete the state, click **Delete State**, then click **Yes** to confirm.
- Click the  icon when finished to close the **Edit State** window.

Add a Trigger & Transition to a State

A **trigger** is what causes an object to move from one state to another. There are three types of triggers:

- **Button:** These triggers are added to [configurable forms](#) as buttons that a user clicks to move the object from its current state to another state (e.g. clicking the Submit for Review trigger on a form will move the object to the In Review state).
- **Timed:** Moves an object to a specified state and can perform actions on a nightly basis at 12:01 am UTC time (e.g. you can create a trigger that notifies users that a deadline is overdue or remind users to launch an assessment on a particular day). This trigger type cannot be added to the creation state.



If a single state contains multiple timed triggers with conditions, you must create separate transitions for each timed trigger.

- **Consume Orchestration Event:** This trigger uses an existing [Send Orchestration Event](#) action on another state or object type to automatically transition an object to another predefined state (e.g. Closing an audit object will also automatically close all issue objects in an Open state). Note that this trigger type cannot be added to the Creation state.

The state an object is moved to is specified by creating a **transition** on the trigger. On that transition, you can create **actions** that perform certain functions once the object has moved to the next state or **conditions** that define certain requirements that must be met before an object is moved to the next state and/or an action is performed. See the [Add an Action to a Transition](#) and the [Add a Condition to a Transition](#) articles for more information. Multiple triggers and transitions can be saved to a single state.



All triggers must have transitions saved to them in order to successfully move the object from state to state.

STATES

+ ADD STATE

● CREATION

⚡ TRIGGERS

+ ADD TRIGGER

CREATION STATE 0 REQUIRED COMPONENTS

Save as Draft ⇌ Transitions to Draft

The Creation state with a trigger configured to transition to the object to the Draft state.

Create a New Incident

Enter the type of incident, your initials and the date the incident was created in the Name field below.
For example, *EL/Hazard 2016/10/26*

Incident Name

Date & Time the Incident Occurred

Location(s)

Incident Type

What Happened?

SAVE AS DRAFT

A configurable form for the Incident object type. The Save as Draft button is a trigger that, once clicked, will move the object to another state. In this case, the object is moved to the Draft state.

To add a trigger and transition to a state:

1. Click the  icon in the top bar > **Object Types** in the **Data Model** section.
2. Click the object type or enter the name of the object type in the **Search** field, then click it to display the **Edit Object Type** page.
3. Click **Configure Workflow** (if only one workflow exists) or select the appropriate workflow.
4. Click **Add Trigger** below the state you want to add the trigger to.
5. Select either **Button**, **Timed**, or **Consume Orchestration Event** from the **Type** dropdown menu.

ADD TRIGGER

×

Type

Select the trigger type... ▾

Name

Description

Color

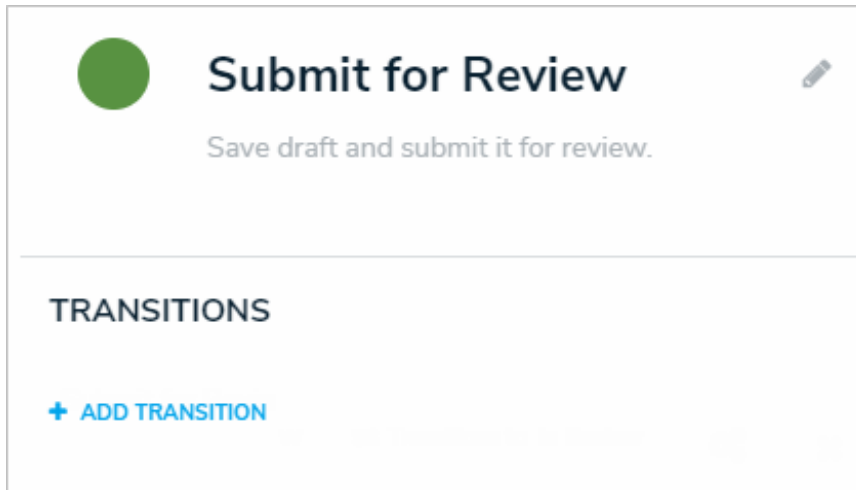
▾

CANCEL

✓ CREATE

The Add Trigger palette.

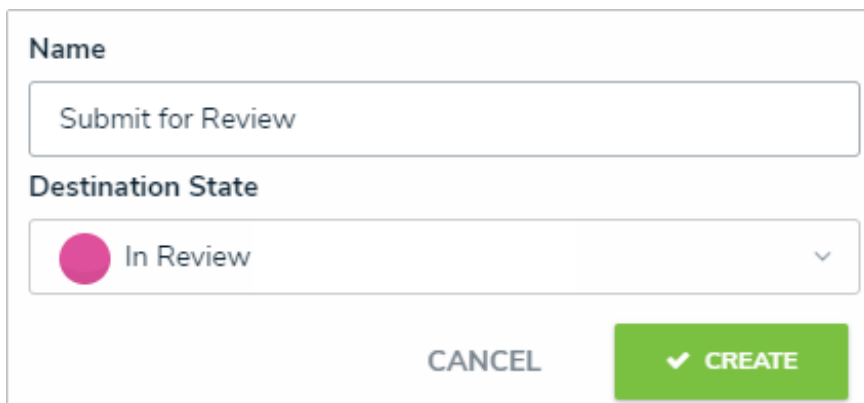
6. Enter a name for the trigger in **Name** field. If you selected the **Button** type, this will appear as a button for users to click on configurable forms.
7. **Optional:** Enter a description of the trigger or include other information, such as its destination state, in the **Description** field. For the **Button** trigger type, a description will appear when clicking the icon  next to the trigger when creating a configurable form and will help you identify which state and transition the trigger is associated with.
8. **Optional:** Click the **Color** dropdown menu to reveal the color picker and select a new color for the button as it will appear on a form. You can also type a hex color into this field to select a color.
9. If you selected the **Timed** trigger type, select **Nightly** from the **Frequency** dropdown menu.
10. If you selected the **Consume Orchestration Event** trigger type, select a previously created event action from the **Orchestration Event** dropdown menu. If you have not yet created an event action, you can leave this field blank and edit the trigger once an event is created. Note that options will appear in this dropdown only if an event action has been previously created using a data definition that includes the object type you're currently configuring. See [Add an Orchestration Event Action on a Transition](#) for more information.
11. Click **Create**.
12. Click the new trigger below the state on the **Edit Workflow** page to open the **Edit Trigger** palette.
13. Click **Add Transition**.



The image shows a UI element titled "Submit for Review" with a green circular icon and a pencil icon. Below the title is the text "Save draft and submit it for review." A horizontal line separates this from a section titled "TRANSITIONS". Below the transitions section is a blue link that says "+ ADD TRANSITION".

The Edit Trigger palette.

14. Enter a name for the transition in the **Name** field.
15. From the **Destination State** dropdown menu, select the state the object should move to.



The image shows a form for configuring a transition. It has two main sections: "Name" and "Destination State". The "Name" section has a text input field containing "Submit for Review". The "Destination State" section has a dropdown menu showing a pink circle icon and the text "In Review". At the bottom right, there are two buttons: "CANCEL" and a green "CREATE" button with a checkmark icon.

Selecting the destination state for a new transition on a button trigger.

16. Click **Create**.
17. Follow the steps above to create additional triggers and transitions as needed.

Once a trigger and transition has been created, you can add [conditions](#) or [actions](#) to that transition.

Add a Condition to a Transition

Conditions allow you to control whether an object is moved to a certain state or if an action will be performed. This is done by using fields, formulas, and workflow states to create a formula with parameters that must be met before the transition or action can occur.

- [Formulas Overview](#)
- [Variables, Operators & Functions](#)
- [Null Values in Formulas](#)
- [Formula Examples](#)

EXAMPLE

Your company has a policy that severe incidents must skip the typical review process and must be investigated immediately. As such, for the Incident object type workflow, you create a condition on the Submit for Review trigger that if the “Severe” option has been chosen on the Incident Severity select list, the object is automatically transitioned to the Investigation Required state once the Submit for Review trigger is clicked on a form.

Admin
Edit Workflow

INCIDENT

STATES

CREATION

⚡ TRIGGERS
+ ADD TRIGGER

Submit for Review
⇌ Transitions to In Review or Investigation Required

Save as Draft
⇌ Transitions to Draft

DRAFT

⚡ TRIGGERS
+ ADD TRIGGER

Save changes to draft incident
⇌ Transitions to Draft

Submit for Review
⇌ Transitions to In Review

INCIDENT CLOSED

EDIT TRIGGER

TRANSITION DETAILS

Name

Destination State

Investigation Required

CONDITIONS

DETAILS

Name

VARIABLES

+ ADD VARIABLE

INCIDENTSE

Field: Incident Severity

FORMULA

A condition on a transition, as displayed in the Edit Trigger palette on the right.

To add a condition on a transition:



Ensure the **state**, **trigger**, and transition you wish to add the condition to have already been created and configured prior to following the steps below.

1. From the **Edit Workflow** page, click a trigger to open the **Edit Trigger** palette.
2. Click the  icon next to the transition.
3. Click **Add Condition**.

TRANSITION DETAILS

Name

Destination State


Investigation Required
▼

CONDITIONS

+ ADD CONDITION

ACTIONS

+ ADD ACTION

The Edit Trigger palette where you can add conditions and actions.

4. **Optional:** Enter a name for the condition in the **Name** field. Conditions are named **Default Condition Formula** by default.
5. Click **Add Variable**.
6. Select either **Field**, **Relationship**, or **Reference** from the **Variable Type** dropdown menu:
 - If you selected **Field**, choose a field or formula from the **Available Components** dropdown menu. The options in this dropdown are fields or formulas added directly to the object type.
 - If you selected **Relationship** or **Reference**:
 - a. Select a relationship or reference saved to the object type from the **Relationship** or **Reference** dropdown menu.
 - b. Select a field, formula, or workflow state from the **Available Components** dropdown menu. These are the fields, formulas, or states saved to the object type(s) in the relationship or reference.
 - c. Select a variable sub-type from the **Sub Type** dropdown menu to specify how the data from multiple objects will be compiled or calculated. See the **Field & Formula Variables** and/or **Workflow State Variables** sections of the [Variables, Operators & Functions](#) article for more information on the available sub-types.



Fields can be added to formulas only if they've been added directly to the object type or if they're saved to an object type associated through a relationship or reference. Only numeric fields, date fields, and select lists with numeric values added to their options are accepted in formulas. See the [Fields](#) category for more information.

7. **Optional:** Enter a name for the variable in the **Name** field. By default, the unique ID of the field or formula is automatically populated.

VARIABLES

Variable Type

Field

Available Components

Incident Severity

Name

INCIDENTSE

Description

☐ Treat empty values as Null

A new condition formula.



Naming a variable after a function will result in an error.

8. **Optional:** Enter a description for the formula in the **Description** field.
9. **Optional:** Select the Treat empty values as Null checkbox if objects with a blank variables should not be assigned a zero (0) value. See the [Null Values in Formulas](#) article for more information.
10. Click **Create**.
11. Continue adding variables by following steps 5-9 above. To remove a variable, click the  icon beside the variable.

INCIDENTSE

Field: Incident Severity



An existing variable on a condition.

12. Using the variable name(s), enter a formula, including any operators and/or functions, in the **Formula** field (e.g. **INCIDENTSE==3**). See the [Variables, Operators & Functions](#) article for more information.

VARIABLES

+ ADD VARIABLE

INCIDENTSE

Field: Incident Severity

FORMULA

INCIDENTSE==3

Creating a new formula using the variable name.



You must use double equal signs (==) in condition formulas. See the [Variables, Operators & Functions](#) article for more information.

13. Click **Done**.

Actions on Transitions Overview

Actions on transitions (not to be confused with actions on activities) allow you to include additional automated processes as an object moves through its workflow states. These processes include:

- **Messaging:** Sends individual emails to users within the selected roles immediately following an object's transition or as a daily email digest. Administrators can select a default or custom email template, as well as which configurable form is displayed when the user clicks the links provided in the email to view the object.
- **Role Management:** Automatically adds a user within a specified role with explicit permissions to the object once it has successfully transitioned into its next state. This action is used to allow users within the role the ability to view objects in their next states without adding them manually through the [role element](#) on a configurable form. For example, Role Management could be used should your organization wish to allow users in the Incident Creator role to be able to automatically view the incident objects they just created while those objects are in the In Review state.
- **Send Orchestration Event:** Moves multiple objects in different states or from different object types into another state. For example, when this action is added to the Audit object type, closing an audit object will also close all open issues. Once an event action has been created, a Consume Orchestration Event trigger is added to the other object types/states that will use the event. The object types this action can be added to is determined by the data definition selected when the action is created.
- **Clear Fields/Roles/Relationships:** Clears the values from selected fields, roles, or relationships on a form. These actions are helpful when users want to relaunch an assessment, but don't want to manually clear previous assessment data. Note that you cannot use this action to clear formula data.
- **Set Field Value:** Auto-completes a **Date & Time** or **Select List** field. For select lists, administrators can choose which option is auto-populated. For date and time fields, admins can auto-populate the current date, the current date plus a selected number of days, or the current date less a selected number of days. This action could be used to set time stamps for start or completion dates on assessments, set deadlines, extend deadlines, etc.

ACTIONS

Type

Role Management

Name

Assign to Manager

Select Type of Role Change

Add Current User To Role

Roles

Managers

CANCEL

✓ DONE

An existing action on a trigger.

To add an action to a transition, see the following articles:

- [Add a Messaging Action to a Transition](#)
- [Add a Role Management Action to a Transition](#)
- [Add a Send Orchestration Event Action to a Transition](#)
- [Add a Clear Fields, Roles or Relationships Action to a Transition](#)
- [Add a Set Field Value Action to a Transition](#)

Add a Messaging Action to a Transition

The **Messaging** action sends an [email](#) to users within one or more selected roles once objects have successfully transitioned to the next state. To control the contents of the email, you can choose a [default](#) or [custom](#) email template and select which configurable form is displayed when the user clicks the link provided in the email to view an object. When creating this action, you must choose one of the following delivery frequencies:

- **Immediate:** Sends an email to users in the selected role(s) immediately following the object's transition.
- **Nightly:** Sends a single email to users in the selected role(s) with a list of the objects that transitioned. If additional nightly messaging actions have been added to other workflows or object types, a single email digest with those objects will be sent to the user **only if the same role and email template has been selected on each messaging action**. If a different role and/or template has been selected for multiple workflows or object types, users may receive multiple nightly emails. Nightly emails are sent at 12:00 am UTC time.

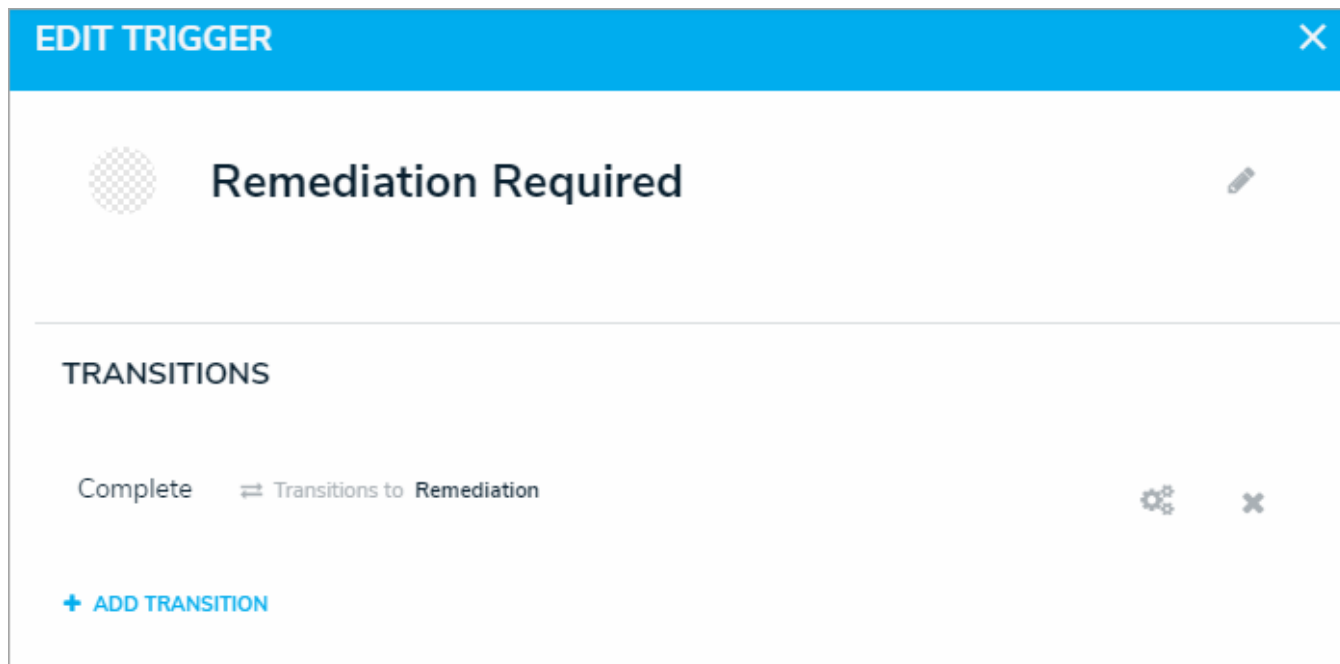
Before you can create this action on a workflow state, a transition must be created. See [Add a Trigger & Transition to a State](#) article for instructions.



The role(s) added to the **Messaging** action must be properly configured for the selected object type and workflow state. See the [Roles](#) and [Workflow Permissions](#) sections for more information.

To add a Messaging action to a transition:

1. From the **Edit Workflow** page, click a trigger below a state to open the **Edit Trigger** palette.
2. Click the  icon next to the transition.



A transition on the Edit Trigger palette.

3. Click **Add Action** in the **Actions** section.



Remediation Required



TRANSITION DETAILS

Name

Destination State

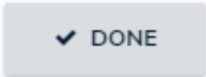

Remediation


CONDITIONS



ACTIONS





The Transition Details, Conditions, and Actions sections sections of the Edit Trigger palette.

4. Select **Messaging** from the **Type** dropdown menu.
5. Enter a name for the action in the **Name** field.
6. Select **Email** from the **Message Types** dropdown menu.
7. Select the roles that should receive the email from the **Roles** dropdown menu.
8. Select a **default** or **custom** template (if any) from the **Email Template** dropdown menu. The default templates (which may have been renamed or edited) include:
 - **Standard:** Advises the user the one or more objects can be accessed.
 - **Assigned:** Advises the user that one or more objects have been assigned to them.
9. Select the configurable form from the **Form Template** dropdown menu. This is the form that will be displayed when the user clicks on an object link in the email.
10. Select one of the following options from the **Delivery Frequency** dropdown menu:
 - **Immediate:** Sends an email to the users in the role(s) immediately following an object's transition. This is the default frequency.

- **Nightly:** Sends an email to the users in the role(s) at 12:00 am UTC time. If additional actions with a nightly frequency have been added to other object types or workflows using the same role and email template, the user will receive a single email digest for multiple object types.

ACTIONS

Type

Messaging

Name

Remediation Required

Message Types

Email x

Roles

Control Owner x

Email Template

Assigned

Form Template

Control - SOX Control Review

Delivery Frequency

Immediate

CANCEL

✓ CREATE

A new Messaging action.

11. Click **Create**.

Add a Role Management Action on a Transition

The **Role Management** action automatically adds a user within a specified role with explicit permissions to the object once it has successfully transitioned into its next state. This action is used to allow users within the role the ability to view objects in their next states without adding them manually through the [role element](#) on a configurable form. For example, this action could be used should your organization wish to allow users in the Incident Creator role to be able to automatically view the incident objects they just created while those objects are in the In Review state.

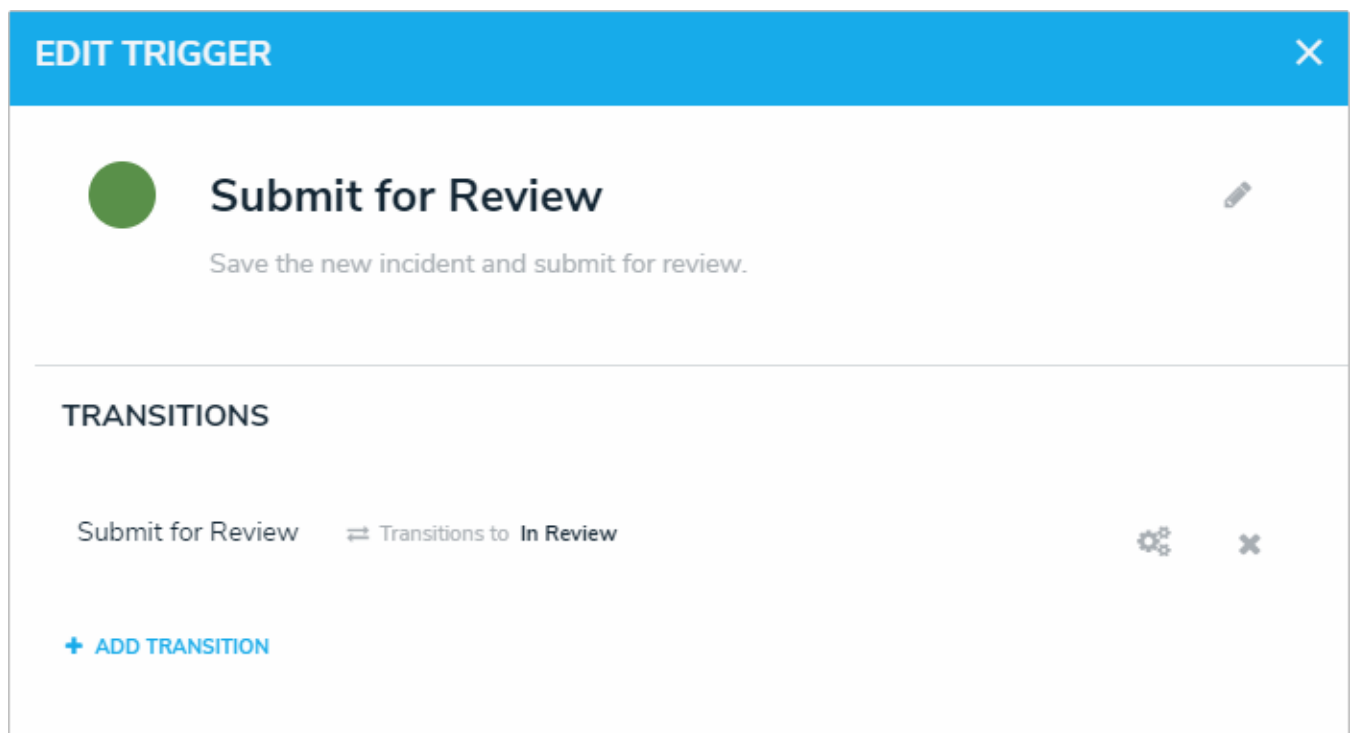
Before you can create this action on a workflow state, a transition must be created. See [Add a Trigger & Transition to a State](#) article for instructions.



The role(s) added to the **Role Management** action must be properly configured for the selected object type and workflow state. See the [Roles](#) and [Workflow Permissions](#) sections for more information.

To add a Role Management action to a transition:

1. From the **Edit Workflow** page, click a trigger below a state to open the **Edit Trigger** palette.
2. Click the  icon next to the transition.



A transition on the Edit Trigger palette.

3. Click **Add Action** in the **Actions** section.

TRANSITION DETAILS

Name

Submit for Review

Destination State

In Review

CONDITIONS

+ ADD CONDITION

ACTIONS

+ ADD ACTION

✓ DONE

The Transition Details, Conditions, and Actions sections of the Edit Trigger palette.

4. Select **Role Management** from the **Type** dropdown menu.
5. Enter a name for the action in the **Name** field.
6. Select **Add Current User to Role** from the **Select Type of Role Change** dropdown menu.
7. Select the roles that should receive the email from the **Roles** dropdown menu.
8. Select one or more roles from the **Roles** dropdown menu or search for roles as needed.

ACTIONS

Type

Role Management

Name

Assign to Manager

Select Type of Role Change

Add Current User To Role

Roles

Q

Managers

CANCEL

✓ CREATE

A new Role Management action.

9. Click **Create**.

Add an Orchestration Event Action on a Transition

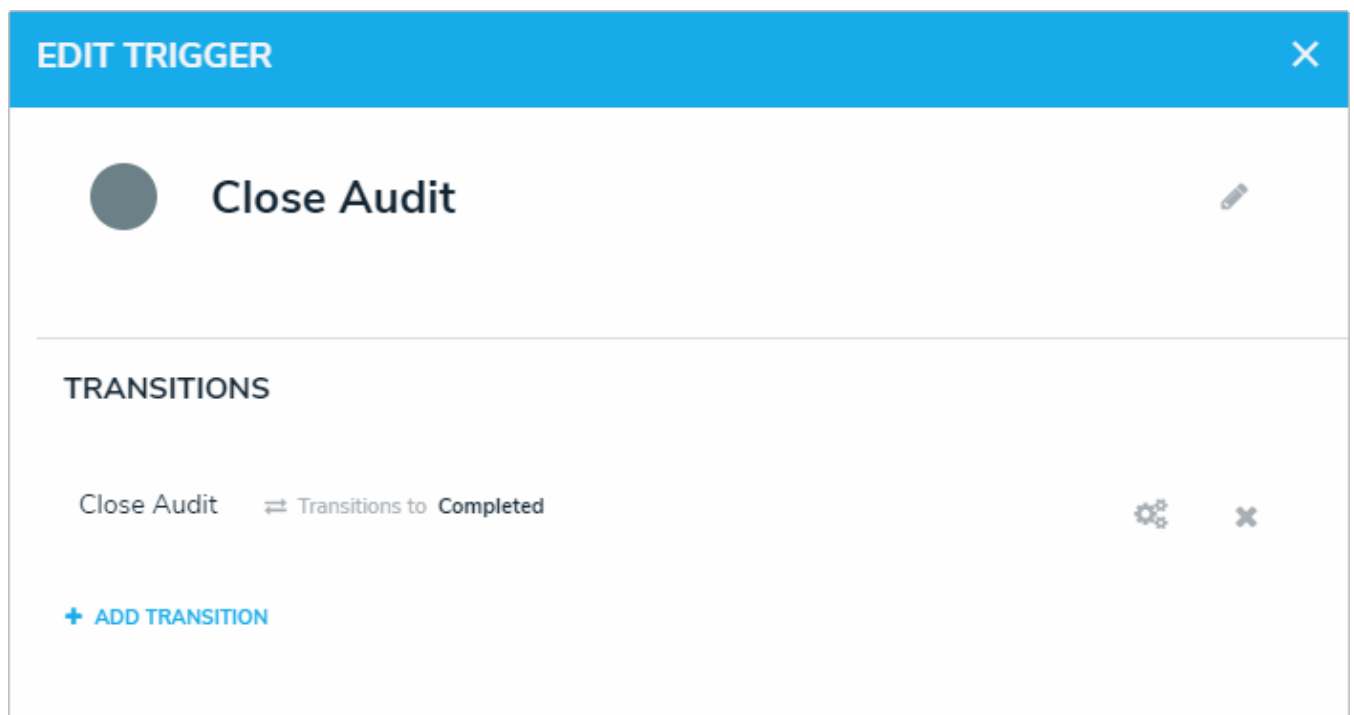
The **Send Orchestration Event** action transitions multiple objects in different states or from different object types into another state. For example, when this action is added to the Audit object type, closing an audit object will also close all open issues at the same time because those issues are no longer applicable.

Once an event has been created, it can be added to other states in the same workflow or on other object types as a **Consume Orchestration Event trigger**. The object types this action can be added to is determined by the [data definition](#) selected when the action is created.

Before you can create this action on a workflow state, a transition and **Consume Orchestration Event** trigger must be created. See [Add a Trigger & Transition to a State](#) article for instructions.

To add a Send Orchestration Event action to a transition:

1. From the **Edit Workflow** page, click a trigger below a state to open the **Edit Trigger** palette.
2. Click the  icon next to the transition.



A transition on the Edit Trigger palette.

3. Click **Add Action** in the **Actions** section.

TRANSITION DETAILS

Name

Close Audit

Destination State

Completed

CONDITIONS

+ ADD CONDITION

ACTIONS

+ ADD ACTION

✓ DONE

The Transition Details, Conditions, and Actions sections of the Edit Trigger palette.

4. Select **Send Orchestration Event** from the **Type** dropdown menu.
5. Enter a name for the action in the **Name** field.
6. Choose a data definition from the **Data Definition** dropdown menu. Ensure the data definition selected includes all other object types you intend to add this action to.

ACTIONS

Type

Send Orchestration Event

Name

Close all issues

Select a Data Definition

Audit > Issues

CANCEL

✓ CREATE

A new Send Orchestration Event action.

7. Click **Create**.

Once successfully created, you can add this action to additional states or object types. You can also use this action to create a trigger on the same object type or additional object types. Note that you can only add this action or trigger to object types that have been selected in the chosen data definition in step 6 above.

Add a Clear Fields, Roles or Relationships Action to a Transition

The **Clear Fields**, **Clear Roles**, and **Clear Relationships** actions clear the values from selected fields, roles, or relationships on a form (excluding formulas). These features are particularly helpful to users who are working with existing assessments because they avoid the need to go into the assessment and manually remove data that's no longer applicable.

For example, the **Clear Fields** or **Clear Relationships** actions could be used when a user is relaunching an assessment, while the **Clear Roles** may be used when assigning an object type or assessment to a new user in a different role.

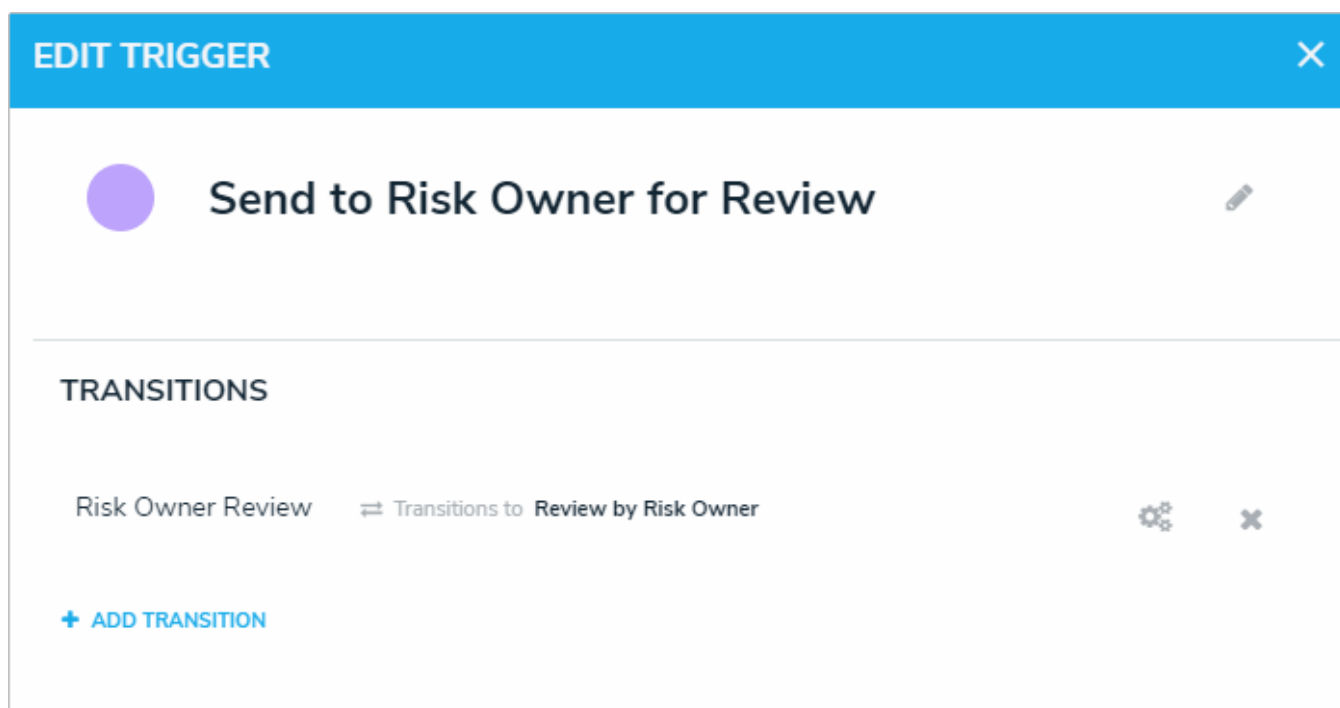
Before you can create these actions on a workflow state, the fields, roles, and relationships must be added to the object type as components and a transition must be created. See [Add a Trigger & Transition to a State](#) article for instructions.



Because the **Clear Roles** action takes precedence over the **Role Management** action, avoid adding both these actions to the same transition as the **Clear Roles** action will clear all roles, including any specified in the **Role Management** action, from the form.

To add a Clear Fields, Clear Roles, or Clear Relationships action to a transition:

1. From the **Edit Workflow** page, click a trigger below a state to open the **Edit Trigger** palette.
2. Click the  icon next to the transition.



A transition on the Edit Trigger palette.

3. Click **Add Action** in the **Actions** section.

TRANSITION DETAILS

Name

Risk Owner Review

Destination State

Review by Risk Owner

CONDITIONS

+ ADD CONDITION

ACTIONS

+ ADD ACTION

✓ DONE

The Transition Details, Conditions, and Actions section of the Edit Trigger palette.

4. Select **Clear Fields**, **Clear Roles** or **Clear Relationships** from the **Type** dropdown menu.
5. Enter a name for the action in the **Name** field.
6. Depending on your selection in step 4 above, make the following selection in the dropdown menu:
 - If you selected **Clear Fields** in the **Type** dropdown menu, select the fields you wish to clear data from (once the object transitions) from the **Fields** dropdown menu.
 - If you selected **Clear Roles** in the **Type** dropdown menu, select the roles field you wish to clear data from (once the object transitions) from the **Roles** dropdown menu.
 - If you selected **Clear Relationships** in the **Type** dropdown menu, select the relationship fields you wish to clear data from (once the object transitions) in the **Relationships** dropdown menu.

ACTIONS

Type

Clear Fields

Name

Clear form

Fields

Q

Automated Control

×

Key Control

×

CANCEL

✓ CREATE

A new clear action.

7. Click **Create**.

Add a Set Field Value Action to a Transition

The **Set Field Value Action** auto-completes one of the following fields saved to the object type:

- A **Date & Time** field based on the date the object transitioned to the next state. For example, this action could be used to add a date to the Completed Date field once the object moves from the In Progress state to the Complete state. Administrators can choose to auto-populate the current date, the current date plus a selected number of days, or the current date less a selected number of days. This action could be used to set time stamps for start or completion dates on assessments, set deadlines, extend deadlines, etc.

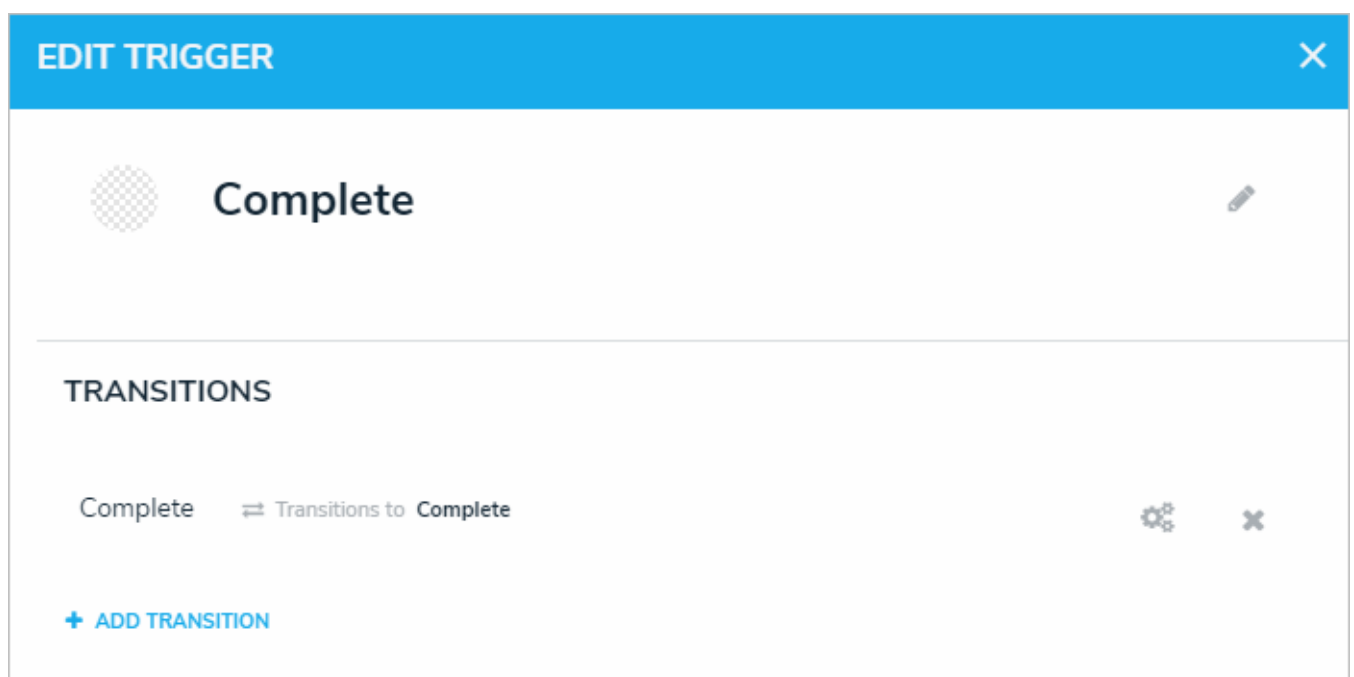


The date and time captured in this action is in UTC time.

- A **Select List** field, including multi-select lists, which auto-fills a pre-defined option or options. For example, this action could be used to select a High Priority option when an Incident object moves from the Open to Escalated state.

To add a Set Field Value action to a transition:

1. From the **Edit Workflow** page, click a trigger below a state to open the **Edit Trigger** palette.
2. Click the  icon next to the transition.



A transition on the Edit Trigger palette.

3. Click **Add Action** in the **Actions** section.

TRANSITION DETAILS

Name

Complete

Destination State

Complete

CONDITIONS

+ ADD CONDITION

ACTIONS

+ ADD ACTION

✓ DONE

The Transition Details, Conditions, and Actions sections of the Edit Trigger palette.

4. Select **Set Field Value** from the **Type** dropdown menu.
5. Enter a name for the action in the **Name** field.
6. Select a **Date & Time** or **Select List** field added to the object type from the **Field** dropdown menu.
7. If field is a date and time field, select one of the following options from the **Value** dropdown menu:
 - **Set Current Date:** Adds the date the object transitioned.
 - **Set Current Date and Add x Days:** Adds the current date the object transitioned, plus an additional number of days. If you select this option, enter the number of days to add in the **Days** field.
 - **Set Current Date and Subtract x Days:** Adds the current date the object transitioned, but subtracts a selected number of days. If you select this option, enter the number of days to subtract from the current date in the **Days** field.

ACTIONS

Type

Set Field Value

Name

Complete Report Date

Field

Q Completed Date

Value

Set Current Date and Add x Days

Days

5

CANCEL

✓ CREATE

A new Set Field Value action for a date and time field.

- If the field is a select list, choose an option from the **Value** dropdown menu. If the field is a multi-select list, you can select multiple options.

ACTIONS

Type

Set Field Value

Name

Escalated Issue Type

Field

Q Issue Type

Value

Human Error

CANCEL

✓ CREATE

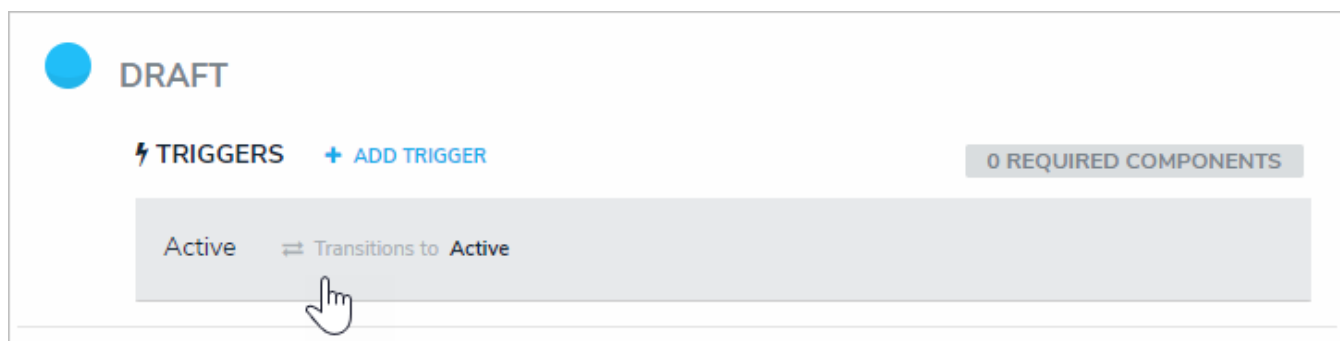
A new Set Field Value action for a select list field.

- Click **Create**.

Edit or Delete a Trigger, Transition, or Action

To edit or delete a trigger, transition, or action:

1. Click the  icon in the top bar > **Object Types** in the **Data Model** section.
2. Click **Configure Workflow**. If there are multiple workflows saved to the object type, click one in the list.
3. Click the trigger you want to edit or delete to open the **Edit Trigger** palette.



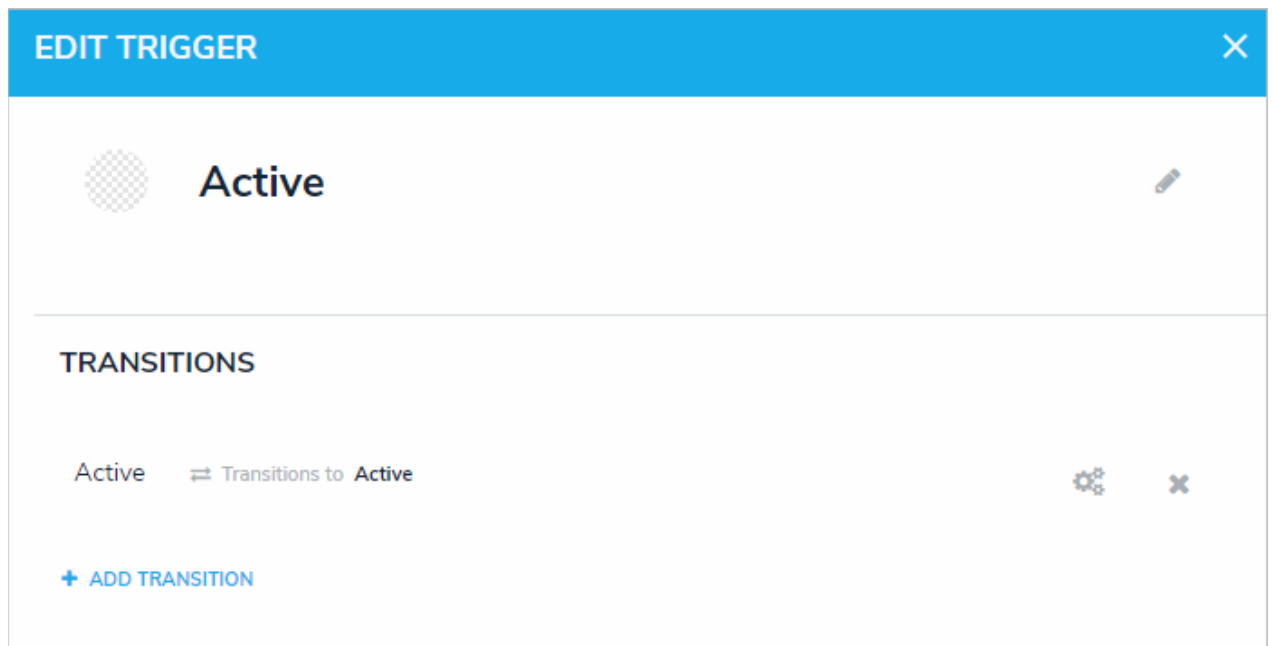
Clicking a trigger to open the Edit Trigger palette.

4. To edit a trigger:

- a. Click the  beside the trigger name to show the trigger settings.
- b. To change the trigger type, select one from the **Type** dropdown menu. See [Add a Trigger & Transition to a State](#) for more information on the different trigger types.
- c. Make changes to the name, description, and color, as needed.
- d. To delete the trigger, its transitions, conditions, and actions, click **Delete**.
- e. Click **Done** when finished.

5. To edit a transition:

- a. Click the  icon in the **Transitions** section.



Transitions on a trigger. Settings can be accessed by clicking the gear icon beside the transition.

- b. Make changes to the transition name and destination state, as needed.
 - c. To edit or delete a condition or action saved to a transition, click the  icon beside the action or transition.
 - d. To delete the transition and any actions or conditions added to it, click the  icon, then click **Yes** to confirm.
6. Click the  icon when finished.

Formulas Overview

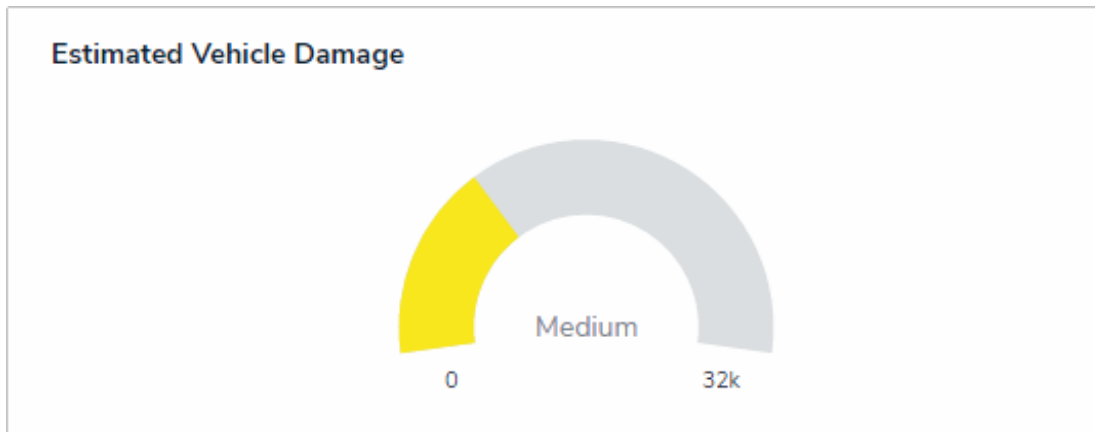
Similar to the formulas used in Excel, Resolver formulas perform calculations using numeric data drawn from select lists, numeric fields, other formulas, or workflow states.

To perform the calculations on this data, administrators create **variables** that represent the fields, formulas, or states. These variables are then added to a code, along with an **operator** (a character in programming and mathematics that represents an action such as add, subtract, or multiply) and/or a **function** (a block of code that performs an action, such as calculating the sum of all values). If the code is valid, the formula produces a numeric result which can be used to draw conclusions (e.g. KRI Status, Estimated Damage, Net Loss, or Average Impact).

EXAMPLE

When an incident involves a vehicle, a formula that estimated a vehicle's damage as Low, Medium, High, or Very High would help managers know whether or not they should escalate the incident. To create the formula, you add a relationship that links Incidents back to the Vehicles object type, then create an "Estimated Vehicle Damage" formula that used the Blue Book Value numeric field on the Vehicles objects to estimate the severity of the damage.

A formula on an object type. In this case, the Estimated Vehicle Damage formula is pulling data from the Vehicles Involved relationship, where numeric data about the vehicle's value has been entered.



A formula displayed as a gauge on an object.

Formulas can be used in a number of components in Resolver Core, including:

- A [condition](#) on a workflow transition to control whether an object is moved to another state;
- A configurable form as a [form element](#) through which the results can be displayed as numbers, labels (e.g. Low, Medium, High), both numbers and labels, or a gauge.
- A rule on a configurable form section to control [section visibility](#) ; and
- A [report element](#) to display data as a chart, table, or heat map.

Before a formula's results can be displayed on a form or report, it must be added to an object type as a component. Note, however, that it's still possible to pull data from formulas on a report, condition, or as a variable in another formula, even if the formula's results aren't displayed on a form. See [Add Formulas to an Object Type](#) for more information.

Variables, Operators & Functions

A formula uses numeric data from a [select list](#), [numeric](#) or [date](#) field, another formula, or workflow state to perform a calculation. This code is comprised of the following components:

- **Variable:** A value on which the calculations are performed. Variables represent the values from a select list, numeric field, another formula, or workflow state. Because formulas use data that can change, all variables must be assigned a name (e.g. LIKELIHOOD for the Likelihood field) that allows the calculations to remain valid, even if the values change. If you're creating a variable using a field, formula, or state from relationship or reference object types, you must select a **variable sub-type** to specify how the data from multiple objects is compiled, calculated, and displayed.
- **Operator:** A character that represents an action. Operators are typically used to perform arithmetic actions (e.g. + for add or * for multiply), but they can also be used to group or compare variables. Operators can be used in formulas that contain a function and multiple operators can be added to a single formula.
- **Function:** A block of code that performs calculations on multiple values. For example, SUM(LOSS) calculates the total values from the Loss numeric field across multiple objects. Because functions require multiple values to complete the calculation, **Relationship** and **Reference** variable types are typically used with functions, however, it's possible to perform functions using fields or formulas added directly to the object type. Functions can be used in formulas that contain operators and multiple functions can be added to a single formula.

Net Loss Formula

TOTALLOSS-TOTALRECOVERED

■ Variable

■ Operator

A formula with two variables and an operator.

Average Impact

MEAN(IMPACT)

■ Variable

■ Function

A formula with a variable and a function.

% of Samples Failed

(SUM(FAILED))/(SUM(TESTED))*100

■ Variable

■ Operator

■ Function

A formula with two variables, four operators (grouping, division, and multiplication), and two functions.

The formulas, operators, and functions in this article are not an exhaustive list of available options. If your organization requires a more complex formula, contact [Resolver Support](#) for assistance.

Field & Formula Variables

Field and formula variables represent the values pulled from numeric fields, date fields, formulas, or select lists, which is the data on which the formula calculations are performed. When using fields or formulas in a **Relationship** or **Reference** variable, a variable **sub-type** must be selected to determine how the data from multiple objects will be compiled, calculated, and displayed. For information on workflow state variable sub-types, see the **Workflow State Variables** section below.

VARIABLES

Variable Type

Relationship

Relationship

Issues

Available Components

Due Date

Sub Type

Array

Array

Sum

Count

Average

Every

Max

Min

Name

DUEDATE

Description

Variable sub-types for a Relationship variable. The Array subtype is selected by default.

Note that the examples in the table below use VARIABLEA with a sample data set of 100, 9, 13, 4, 1. This data set represents the numeric values that would be collected from multiple objects.

SUB-TYPE NAME	DESCRIPTION	EXAMPLE
Array	Creates a set of values from the variable. To display these values in a formula, they must first be converted into a single value using a function (i.e. sum, min, max, or mean). This is the default subtype.	Selecting the Array sub-type for VARIABLEA will return the values from the variable on every object in the relationship/reference (e.g. 100, 9, 13, 4, 1). Before the data from VARIABLEA can be displayed or used within a larger formula, it must be aggregated into a single value using a function (e.g. SUM(VARIABLEA)).
		Selecting the Sum sub-type for

Sum	Calculates a total from the variable's set of values and returns a single number. This subtype is not available for select list variables.	VARIABLEA will return the sum of all values pulled from VARIABLEA on every object in the relationship/reference (e.g. 127).
Count	Returns the number of times a variable has been added to an object, thereby counting the number of objects in the relationship/reference.	Selecting the Count sub-type for VARIABLEA will return the number of times VARIABLEA appears on the objects in the relationship/reference (e.g. 5).
Average	Calculates an average number from the variable's set of values. This subtype is not available for select list variables.	Selecting the Average sub-type for VARIABLEA will return the sum of all numeric values in VARIABLEA, divided by the number of objects in the relationship/reference (e.g. $(100 + 9 + 13 + 4 + 1) / 5 = 25$).
Every	Checks if the variable contains a value on the objects in the relationship/reference. If all objects contain <i>any</i> value, a 1 (representing a true result) is returned. If some or all of the objects are missing a value, a 0 (representing a false result) is returned. This subtype does not check for specific values and is typically used in a workflow condition to control if an object can move into the next state.	Selecting the Every sub-type for VARIABLEA will check if VARIABLEA contains a value on all the objects in the relationship/reference. If all the objects contain a value, the result is 1 (true). If some or all of the objects are missing a value, the result is 0 (false).
Max	Calculates the highest number from the variable's set of values. This subtype is not available for select list variables.	Selecting the Max sub-type for VARIABLEA will return the highest number from the set of values (e.g. 100).
Min	Calculates the lowest number from the variable's set of values. This subtype is not available for select list variables.	Selecting the Min sub-type for VARIABLEA will return the lowest number from the set of values (e.g. 1).

Workflow State Variables

Workflow state variables represent the current state of one or more objects in a **Relationship** or **Reference** variable type using states from the object type's workflow or any related assessment workflows. These variables require a **sub-type** to determine how the state data will be compiled, calculated, and displayed. Both library and assessment workflow states can be selected in these variable types.

VARIABLES

Variable Type

Relationship

Relationship

Issues

Available Components

Closed

Sub Type

All

Name

CLOSEDISSUE

Description

A workflow state variable type. The All sub-type is selected by default.

Note that the examples in the table below use CLOSEDISSUE as the variable, which represents the Closed workflow state of objects in the Issues relationship.

SUB-TYPE NAME	DESCRIPTION	EXAMPLE
All	Checks if all objects in the relationship or reference are in the state selected in the Available Components dropdown menu. If all the objects are in the specified state, a 1 (representing a true result) is returned. If some or all of the objects aren't in the specified state, a 0 (representing a false result) is returned. This is the default sub-type for workflow state variables.	Selecting the All sub-type for the CLOSEDISSUE variable will check if all the objects in the Issues relationship are in the Closed state. If all objects are in the Closed state, the result is 1 (true). If some or all of the objects are not in the Closed state, the result is 0 (false).

Any	Checks if any of the objects in the relationship or reference are in the state selected in the Available Components dropdown menu. If some or all of the objects are in the specified state, a 1 (representing a true result) is returned. If none of the objects are in the specified state, a 0 (representing a false result) is returned.	Selecting the Any sub-type for the CLOSEDISSUE variable will check if any of the objects in the Issues relationship are in the Closed state. If some or all of the objects are in the Closed state, the result is 1 (true). If none of the objects are in the Closed state, the result is 0 (false).
Count	Returns the number of objects in the relationship or reference that are currently in the state selected in the Available Components dropdown menu.	Selecting the Count sub-type for the CLOSEDISSUE variable will return the number of objects in the Issues relationship that are currently in the Closed state (e.g. 12).

Operators

Operators are used to perform basic calculations, compare, assign, or group data, or compare data to return a true or false (Boolean) result.

Examples in the table below that include an ellipsis (...) indicate that the operator and its components cannot be used as a standalone formula and must be part of a larger formula.

OPERATOR	NAME	DESCRIPTION	EXAMPLE	RESULT
()	Grouping	Groups variables and operators within a formula to create a single value.	2 * (3 + 4) ...	14
+	Add		4 + 5	9
-	Subtract		7 - 3	4
*	Multiply		2 * 3	6
/	Divide		6 / 2	3
==	Equal to	Checks if the variable's value matches the value entered	X == 4 ...	If X has a value of 4,

		following the == symbol. If so, the result is true .		the result is true .
!=	Unequal	Checks if the values of two variables are different. If they're different, the result is true .	2 != 3	True
?:	Conditional expression	Checks if the value of a variable is true or false . If true , the result is the value entered after the ? symbol. If false , the result is the value entered after the : symbol.	15 > 100 ? 1 : -1	-1
<	Less than	Checks if the value of the left variable is less than the value of the right variable. If yes, the result is true .	2 < 3	True
>	Greater than	Checks if the value of the left variable is greater than the value of the right variable. If yes, the result is true .	2 > 3	False
<=	Less than or equal to	Checks if the value of the left variable is less than or equal to the value of the right variable. If yes, the result is true .	4 <= 3	False
>=	Greater than or equal to	Checks if the value of the left variable is greater than or equal to the value of the right variable. If yes, the result is true .	2 + 4 >= 6	True
and	Logical <i>and</i>	If both variables are true , the result is true . If either or both variables are false , the result is false .	X == 5 AND Y == 5 ...	If both X and Y have a value of 5, the result is true . If either X or Y has a value other than 5, the result is false .

or	Logical <i>or</i>	If either or both of the variables are true , the result is true . If one or both of the variables is false , the result is false .	X == 4 OR Y == 3 ...	If Y has a value of 4, the result is true . If X is false , but Y is 3, the result is true . Otherwise, the result is false .
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Functions

Functions perform a task or calculate a value. Because functions require multiple values to complete the calculation, **Relationship** and **Reference** variable types are typically used with functions, however, it's possible to perform functions using fields or formulas added directly to the object type.

NAME	DESCRIPTION	EXAMPLE	RESULT
Max	Calculates the maximum value from a variable.	max(A)	The highest numeric value of the variable A (e.g. 8).
Mean	Calculates the mean value from a variable.	mean(A)	The sum of all numeric values in variable A, divided by the amount of numbers in the set (e.g. 5 + 8 + 4 + 4 / 4 = 5.25).
Min	Calculates the minimum value from a variable.	min(A)	The lowest numeric value of variable A (e.g. 1).
Sum	Calculates the total value from a variable.	sum(A)	The total of all numeric values in variable A (e.g. 15).
timeDiff	Compares the days, months, or seconds between variables. This function requires date-related data from two Date & Time fields or a Date & Time field and the today() function. See the Time Functions article for more information.	timeDiff(A,B"days")	The difference in days between variables A and B (e.g. 5 days).
	Offsets a variable by number of seconds, days, or months. This		

timeOffset	function requires a Date & Time field variable. This function returns the offset date in Unix timestamp which will need to be converted manually. See the Time Functions article for more information.	timeOffset(A,1,"days")	Offsets the date in variable A by one day.
today	Returns the current date. This function does not accept any parameters (variables inside the parentheses), however, it can be used as parameters inside the timeDiff function.	timeDiff(A,today(),"days")	The difference in days between variable A and today's date.

Examples

For a list of common formulas, see the [Formula Examples](#) article.

Time Formula Functions

Like other formula functions, the **timeDiff** and **timeOffset** functions use date-related data to perform a calculation or task. These functions do **not** require multiple values and therefore do not require **Relationship** or **Reference** variable types or data from more than one field or formula.

timeDiff

This function returns the difference between two dates using two **Date & Time** variables or a **Date & Time** variable and the **today** function. By default, this function returns the difference between the dates in seconds, however, you can specify that the results are returned in days or hours.

Using the dates May 14, 2018 (variable A) and May 15, 2018 (variable B) as examples, this function could return the following:

UNIT OF TIME	FORMULA	RESULT
Seconds (default)	timeDiff(A,B)	86400
Hours	timeDiff(A,B,"hours")	24
Days	timeDiff(A,B,"days")	1
Today's date (May 14, 2018), days	timeDiff(today(),A,"days")	1

timeOffset

This function offsets (adds or subtracts) seconds, days, or months from a **Date & Time** field variable.

Before using this function, note that:

- This function returns results in Unix (epoch) timestamp format (e.g. May 2018 is returned as 1525132800). **This output is not converted by Resolver Core and must be done manually.** To convert your timestamp into standard time or vice versa, see the [Convert Unix Time](#) website. To calculate the difference between two dates by seconds, days, or months, see the [Time Duration Calculator](#).
- Depending on how you intend to use the **timeOffset** function in a formula, it's possible to display the results in a standard date format by inserting the Unix timestamps into the **Max Value** field, then creating a label for the timestamp's date equivalent (see screenshot below for an example). Contact [Resolver Support](#) for additional information.

DISPLAY

Format

None

Range as

Label

↺

Color



Label

May 15, 2018

Max Value

1526342400

✓

🗑️

Color



Label

May 15, 2019

Max Value

1557878400

✓

🗑️

Configuring a formula's display settings to display Unix timestamps as a standard date format.

Using May 15, 2018 (variable A) as an example, this function could return the following:

UNIT OF TIME	FORMULA	RESULT
Seconds	timeOffset(A,86400,"seconds")	1526495700 (May 16, 2018)
Days	timeOffset(A,2,"days")	1526582100 (May 17, 2018)
Months	timeOffset(A,1,"months")	1529087700 (June 15, 2018)
Days (subtracted)	timeOffset(A,-3,"days")	1526150100 (May 12, 2018)

Null Values in Formulas

By default, when an object with a blank field or formula variable is included in a formula, that variable is assigned a zero (0) value, which may produce unexpected results, depending on the kind of formula you're creating. To prevent this, administrators can select the **Treat empty values as Null** checkbox when creating or configuring formulas, which will ensure any blank variables are treated as being empty and are therefore not included in the calculation.

For example, using the Min [function](#) , you need to create a formula that calculates the lowest numerical value of a field variable. There are currently three objects with that field that will be included in the formula: Object 1 with a value of 200, Object 2 with a value of 600, and Object 3 with no value.

If you create the formula without selecting the **Treat empty values as Null** checkbox, the formula's result will be 0 because Object 3 was blank and was automatically assigned 0. However, if the checkbox is selected, the formula will omit Object 3 from its calculations and produce a result of 200.

VARIABLES

Variable Type

Select one...

Name

Description

*

☐

Treat empty values as Null

CANCEL

✓

CREATE

A new formula. Selecting the Treat empty values as Null checkbox will skip over any objects that contain blank variables.

Formula Examples

This article provides a list of common formulas. Note that these formulas contain variables and calculations that may not be applicable to your organization. For more detailed information on formulas, see the following articles:

- [Formulas Overview](#)
- [Variables, Operators & Functions](#)
- [Time Functions](#)
- [Null Values in Formulas](#)
- [Add Formulas to an Object Type](#)

Examples

When reviewing the examples below, note that:

- Variables represent [numeric](#) and [date](#) fields, [select lists](#), [workflow states](#), or other formulas; and
- Functions require data from multiple objects. As such, only **Relationship** and **Reference** variable types can be used with a function.

NAME	FORMULA	VARIABLES	OPERATORS	FUNCTIONS	RESULT
Average Impact	MEAN(IMPACT)	IMPACT (Inherent Impact)		Mean	Calculates the mean value of Inherent Impact from objects in the Risks relationship, divided by the number of times the variable appears on the objects.
Control Effectiveness	CONTROLEFF	CONTROLEFF (Control Effectiveness)			Provides a count of the value from the Control Effectiveness field. Note that if a count of values from multiple objects is required, a relationship or reference variable type

					used with the sum function is required.
Design Effective	DE==1?1:0	DE (Design Effectiveness)	== (equal to), ?: (conditional expression)		Checks if Design Effectiveness equals 1. If yes, the formula outputs 1, otherwise, it outputs 0.
Indicator Status	(CURRENT-TARGET)*DIRECTION	CURRENT(Current Value), TARGET (Target Value), DIRECTION (Desired Direction)	() (grouping), - (minus), * (multiply)		Subtracts the value of Target Value from Current Value, then multiplies the total by the value of Desired Direction.
Inherent Risk Score	IN_IMPACT*IN_LIKELIHOOD	IN_IMPACT (Inherent Impact), IN_LIKELIHOOD (Inherent Likelihood)	* (multiply)		Multiplies the value of Inherent Impact by the value of Inherent Likelihood.
KRI Status	TYPE==1 AND CV>LL AND CV	TYPE (Type), CV (Current Value), LL (Lower Limit), UL (Upper Limit)	== (equal to), and (logical and), > (greater than), < (less than), ? : (conditional expression)		Checks if the value of Type is 1, if the value of Current Value is greater than Lower Limit, and if the value of Current Value is less than Upper Limit. If yes,

					the formula outputs a value of 1, otherwise it outputs 2.
Material Weaknesses	IC==2?1:0	IC (Issue Classification)	== (equal to), ?: (conditional expression)		Checks if the value of Issue Classification is 2, If yes, the formula outputs a value of 1, otherwise it outputs 0.
Maximum Likelihood	MAX(LIKELIHOOD)	LIKELIHOOD (Inherent Likelihood)		Max	Calculates the highest numeric value of Inherent Likelihood from objects in the Risks relationship.
Net Loss	TOTALLOSS-TOTALRECOVERED	TOTALLOSS (Total Loss Amount), TOTALRECOVERED (Total Recovered Amount)	- (minus)		Subtracts the value of Total Loss Recovered from Total Loss Amount.
No. of Open Actions	SUM(OA)	OA (Open Actions)		Sum	Calculates the sum of values of Open Actions from objects in the Processes relationship.
					Divides the sum of values of No. of Samples

Percentage of Samples Failed	$(\text{SUM}(\text{FAILED})) / (\text{SUM}(\text{TESTED}) * 100$	FAILED (No. of Samples Failed) TESTED (No. of Samples Tested) Control	/ (divide), * (multiply)	Sum	Failed by the sum of No. of Samples Tested from objects in the Tests relationship, then multiplies the total by 100.
Percentage of Testing Complete	$\text{TESTING} / \text{PLANNED} * 100$	TESTED (No. of Samples Tested), PLANNED (Total Samples Planned)	/ (divide), * (multiply)		Divides the value No. of Samples Tested by Total Samples Planned, then multiplies the total by 100.
Time to Fix	$\text{timeDiff}(\text{DATECOMPLETED}, \text{DATEIDENTIFIED}, "days")$	DATECOMPLETED (Issue Resolution Date), DATEIDENTIFIED (Issue Identification Date)		timeDiff	Displays the difference, in days, between the Issue Resolution Date and the Issue Identification Date.
Total Cost	$\text{QTY} * \text{COST}$	QTY (Quantity), COST (Cost)	* (multiply)		Multiplies the value of Quantity by Cost.

Object Type Groups Overview

Object type groups assemble one or more object types into a category to create [relationships](#) . Object type groups are required when creating relationships because they allow users to create and draw data from multiple object types via a single relationship, which thereby prevents administrators from having to create multiple relationships for each relevant object type.

EXAMPLE

Because the person creating an Incident object may not be the same person who was directly involved in the incident (e.g. witness, victim, suspect, etc.), you want to track these people, whether they are an employee or visitor. To do this, you create a People object type group and add the Employee Record and People object types, then select this group when creating a People Involved relationship on Incident. Now, when an Incident object is created, the user can select an existing record or create a new one from either the Employee Record or Person object types in the People Involved field on a form.

PEOPLE

Name

People

Long Name

The Long Name is optional and can be used in select parts of the application to provide a more detailed label to the user.

RELATED OBJECT TYPES

Select one...

+ ADD SELECTED (0)

ER

Employee Record

P

Person

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*An object type group. In this case, the People group has the Employee Record and Person object types saved to it.
This group will be used to create the People Involved relationship on the Incident object type.*

Edit Relationship: People Involved

Relationship Name

People Involved

Reference Name

The Reference name is the reverse of the relationship name (e.g. Witness > Witnessed). It will be used when a relationship is displayed as a reference on an object type form.

Long Name

The Long Name is optional and can be used in select parts of the application to provide a more detailed question to the user.

Object Type Group

People

The People Involved relationship that will appear on the Incident object type. Note that the People object type group has been selected on this relationship.

Incident Details

Date & Time the Incident Occurred



People Involved

Start typing to find People Involved or create new

CREATE NEW

Location

Start typing to find Location or create new

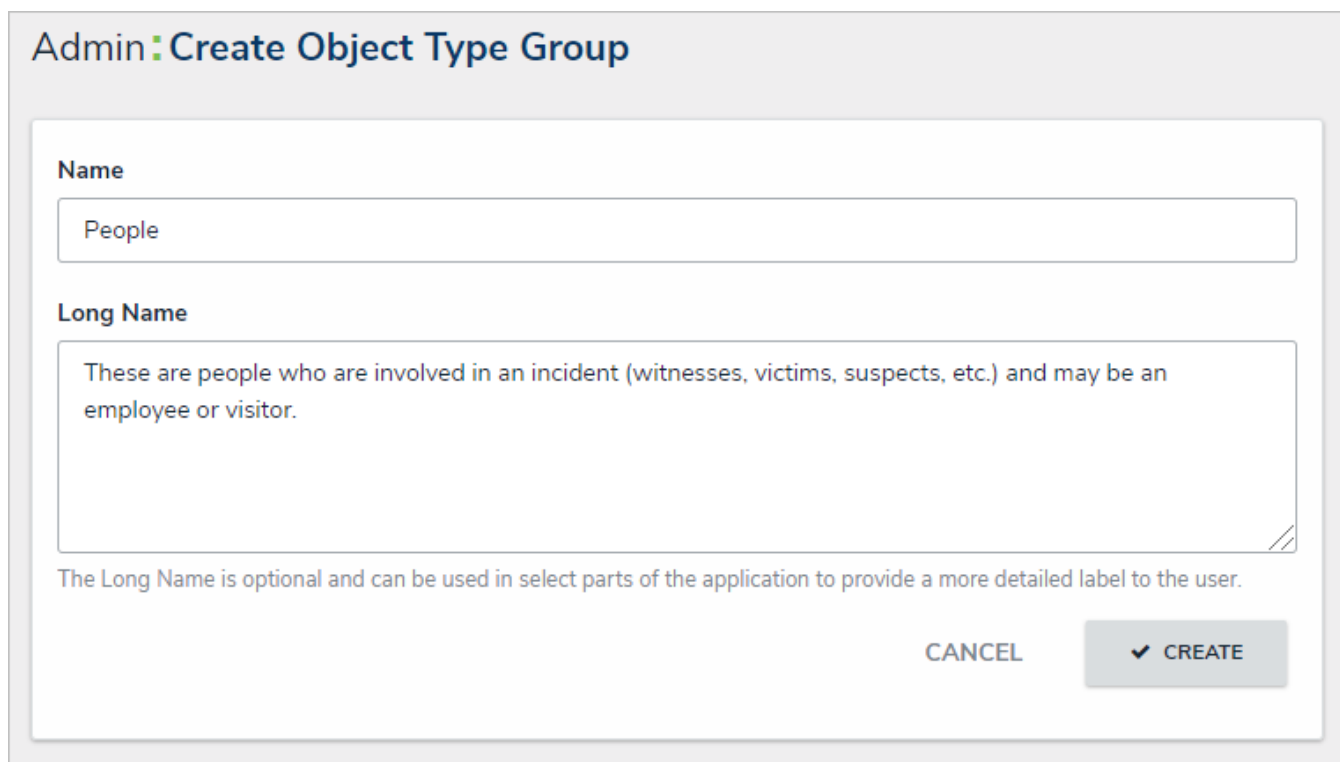
CREATE NEW

The People Involved relationship as it appears on a new Incident object.

Create a New Object Type Group

To create a new object type group:

1. Click the  icon in the top bar > **Object Type Groups** in the **Data Model** section.
2. Click **Create Object Type Group**
3. Enter a name for the object type in the **Name** field.
4. **Optional:** Enter a brief description of the object type group in the **Long Name** field, which will appear below the object type when editing it.



Admin: Create Object Type Group

Name

People

Long Name

These are people who are involved in an incident (witnesses, victims, suspects, etc.) and may be an employee or visitor.

The Long Name is optional and can be used in select parts of the application to provide a more detailed label to the user.

CANCEL **✓ CREATE**

The Create Object Type Group page.

5. Click **Create** to display the **Related Object Types** section.
6. In the field in the **Related Object Types** section, enter the name of the object type you want to add or select it from the dropdown menu. Continue to add more object types as needed.

Admin : Edit Object Type Group

PEOPLE

Name

People

Long Name

These are people who are involved in an incident (witnesses, victims, suspects, etc.) and may be an employee or visitor.

The Long Name is optional and can be used in select parts of the application to provide a more detailed label to the user.

RELATED OBJECT TYPES

Employee Record



Person



+ ADD SELECTED (2)

A new Object Type Group. After clicking Create, the Related Object Types section is displayed.

7. Click **Add Selected**.
8. Click **Done** when finished.

Edit or Delete an Object Type Group

To edit or delete an object type group:

1. Click the  icon in the top bar > **Object Type Groups** in the **Data Model** section.
2. Click the object type group you want to edit to display the **Edit Object Type Group** page.
3. Enter an alternate name in the **Name** or **Long Name** fields, as needed.
4. To add an additional related object type, enter the name of the object type you want to add or select it from the dropdown menu in the **Related Object Types** section, then click **Add Selected**.
5. To remove a related object type, click the  icon next to that object type.
6. To delete the object type, click the  icon, then click **Yes** to confirm.
7. Click **Done** when finished.

Fields Overview

An object type's fields are where users will input data. Fields are available in the following formats:

- **Plain Text:** A text field that allows for a single line or multiple lines of text and optional concatenation.
- **Numeric:** A field that allows for numbers.
- **Date & Time:** A picker that allows you to select the date and time. All dates and times are saved and displayed in UTC format.
- **Select List:** A dropdown menu with multiple options to choose from.
- **Attachments:** An area on the form that allows users to upload files or URLs.
- **Image Attachment:** A field through which images can be uploaded and embedded onto a form.

Which type of Field would you like to create?

Plain Text
A text box allowing a single line of text.

Plain Text

Numeric
A numeric field allowing any numbers to be entered. This is an unformatted number.

Numeric

Date & Time
A picker that allows selection of a date and optional time.

Date & Time

Select List
A list of options to be selected from.

Select List

Select one... 

Attachments
An area on the form users can attach files to the object.

Attachments



The field types you can create and add to an object type (Image Attachment not shown).

Once a field has been created it can be added as a component to any object type. All fields [added](#) to an object type will appear on the object type's default form, but you can select which fields will appear on any [configurable forms](#) associated with the object type. Once linked to an object type, all fields, except for **Attachments** and **Image Attachments**, can be embedded in an [email template](#) as variables when the [Messaging](#) action is triggered on a workflow.

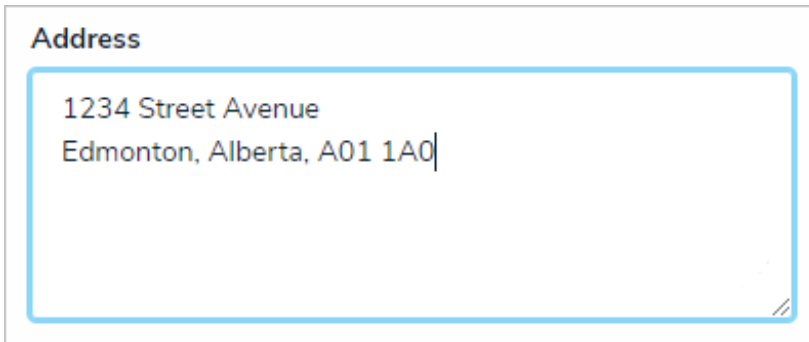


You can confirm if a field has been added to an object type by opening the field's **Editing Field** page, then reviewing the **Related Object Types** section at the bottom of the page. You can click an object type in this section to view its **Edit Object Type** page.

The **Fields** settings allow you to create, edit, and delete fields, which can then be added to an object type, but you can also create and add fields from the **Edit Object Type** page. See [Add Fields to an Object Type](#) section for more information.

Plain Text Fields

A plain text field allows users to enter a single line or multiple lines of text, depending on the field's settings. Through the field's settings, administrators can also create concatenations.



A multiple-line plain text field on an object.

Concatenation

Concatenations pull data from [properties](#) and other [fields](#) to automatically populate the values in a plain text field.



Concatenation can also be added to the **Name** and **Description** properties on an object type. See the [Name & Description Concatenation Overview](#) article for more information.

To specify which data is populated in the field, administrators edit a plain text field, select a [data definition](#) and an object type in that definition, then one or more properties or fields to create variables, which are then used to create an expression. For example, if you created variables for the City and Address select list fields, the expression would look similar to {{{City}}}, {{{Address}}}.

Unlike concatenations on an [object type](#), you can select any data definition within the org to filter which properties and fields are available for variables, but prior to creating expressions, you must ensure the fields you want to include in the variables have been [added](#) to the appropriate object type(s) and have or will be added to the relevant [configurable form\(s\)](#). The **Unique ID**, **Created By**, and **Created On** properties do not need to be added to the form as they are auto-generated and cannot be modified.

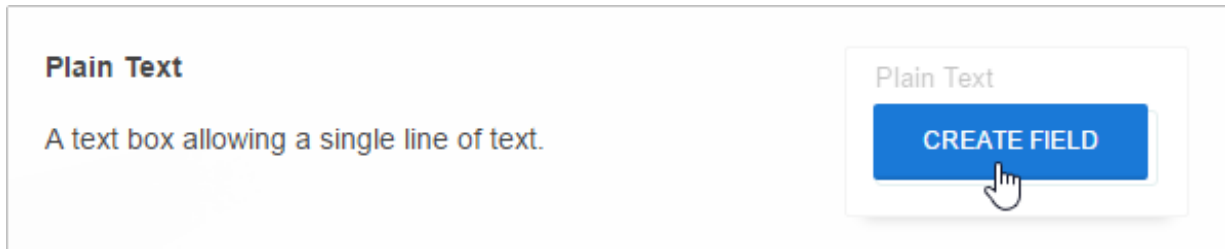


Concatenations **do not** apply to existing objects.

To create a plain text field:



1. Click the  icon in the top bar > **Fields** in the **Data Model** section.
2. Click **Create Field**.
3. Hover your cursor over the **Plain Text** field type, then click **Create Field**.



The Plain Text field type on the Field Types settings page.

4. Enter a name for the field as it will appear on an object type in **Field Name**.
5. **Optional:** If needed, provide additional information or instructions on completing the field in the **Long Name** section, which can be styled using [Markdown](#) . You can choose to display a field's long name on configurable forms.

A screenshot of the 'Admin : Create a Field' form. The form has three main sections: 'Field Type' with a dropdown menu showing 'Plain Text'; 'Field Name' with a text input field containing 'Contact Information'; and 'Long Name' with a larger text area and a help icon. The form is set against a light gray background with a header bar.

The Field Name and Long Name fields.

6. **Optional:** Enter a minimum number of characters the user must enter in the field. If you select a maximum number of characters in step 7 below, the minimum number must be less than or equal to the maximum.
7. **Optional:** Enter a maximum number of characters the user can enter in the field. If you selected a minimum number of characters in step 6 above, the maximum number must be greater than or equal to the minimum.

Minimum Characters

e.g. 10, 140, etc.

Minimum Characters is optional. It must be a whole number less than or equal to Maximum Characters (if set).

Maximum Characters

e.g. 10, 140, etc.

Maximum Characters is optional. It must be a whole number greater than or equal to Minimum Characters (if set).

The Minimum Characters and Maximum Characters fields.

8. Select either **Single Line** (for a single line of text in a field) or **Multiple Line** (for multiple lines/paragraphs in the field) in the **Text Type** section.
9. Use the **Preview** section to confirm the field is correct.

 **PREVIEW**

Notes

The Preview section of a new plain text field. You can enter sample text in this field to confirm if the field settings, such as minimum or maximum characters, are correct.

10. Click **Create**, which will display the **Editing Field** page.
11. **Optional:** To create a value on concatenation on the field:
 - a. Click **Configure Value Concatenation** in the **Text Type** section to display the **Edit Concatenation** screen. This option will not appear until the field is saved.

Text Type

☐ Single Line
 ☒ Multiple Lines

 **CONFIGURE VALUE CONCATENATION**

The Configure Value Contention settings in the Text Type section.

- b. Select a data definition from the **Data Definition** dropdown menu. This will determine which object types' properties and fields are available to add as variables.

EDIT CONCATENATION

DETAILS

Data Definition

Employees

VARIABLES

+ ADD VARIABLE

EXPRESSION

Variables must be wrapped in triple braces. Eg: {{{VARIABLE1}}}-{{{VARIABLE2}}}

SAVE EXPRESSION

A new concatenation with no variables or expression.



If you want to select another data definition, you must delete the concatenation by clicking the **X** icon beside the concatenation on the **Editing Field** page, then recreate it.

- c. Click **Add Variable**.
- d. Select an object type in the data definition from the **Select Object Type** dropdown menu.
- e. Select a property or field you want to auto-populate in the plain text field. For example, selecting the **Created By** property will auto-populate the name of the user who created an object. If you selected the **Created On** property or **Date** field, select a date format (e.g. YYYY-MM-DD) from the **Variable Format** dropdown menu.
- f. Enter a name for the variable in the **Variable Name** field. Spaces and special characters are **not** permitted.
- g. **Optional:** If you want a default value to populate in the concatenation when the variable contains no data, enter that value in the **Default Value** field (e.g. "Null" or "None provided").

- h. If the variable is from the same object type where the plain text field is saved as a component, (e.g. the plain text field is saved to the Employee Record object type and the variable you're creating is also from a property or field also on the Employee Record object type) select the **Self** checkbox.

VARIABLES

Select Object Type

Employee Record

Available Component

Property: Name

Variable Name

EmployeeName

Default Value

None provided

☒ Self

ADD

CANCEL

Creating a new variable in the Edit Concatenation palette.

- i. Click **Add** to save the variable.

VARIABLES

EmployeeName

Property: Name

+ ADD VARIABLE

A new variable, which can now be included in the expression.

- j. Repeat steps a-i above to continue adding variables as needed.

- k. Type the variable names in the **Expression** field. Variables can be entered in any order, but they must be enclosed in triple curly braces (e.g. {{{CreatedBy}}}). If needed, you can include spaces and other alphanumeric characters between the variables.

EXPRESSION

```
{{{EmployeeName}}}, {{{EmployeeAddress}}}, {{{EmployeePhoneNumber}}}
```

Variables must be wrapped in triple braces. Eg: {{{VARIABLE1}}}-{{{VARIABLE2}}}

SAVE EXPRESSION

An expression with variables. All variables must be enclosed in triple curly braces.

- l. Click **Save Expression**.

Text Type

☐ Single Line ☒ Multiple Lines

 **CONFIGURE VALUE CONCATENATION**

 {{{EmployeeName}}}, {{{EmployeeAddress}}}, {{{EmployeePhoneNumber}}}

The new expression saved to the plain text field and displayed on the Editing Field page.

- m. To edit a variable, it must be deleted by clicking the  icon from the **Edit Concatenation** palette, then recreated.
- n. To delete the concatenation, click the  icon from the **Editing Field** page.

Employee Details 

Title

Phone Number

E-mail

Address

DOB

 October 17, 2017 

The fields used as variables in the expression.

Contact Information

Kevin Darden, 123 Street Avenue, Edmonton, Alberta, A1A 1A1, 5555551234

The variable fields successfully populating in the Contact Information field.

Numeric Fields

A numeric field allows users to type numbers into a form.

Time Spent (Hrs)

2

A numeric field on an object.

To create a numeric field:

1. Click the  icon in the top bar > **Fields** in the **Data Model** section.
2. Click **Create Field**.
3. Hover your cursor over the **Numeric** field type, then click **Create Field**.

Numeric
A numeric field allowing any numbers to be entered. This is an unformatted number.

Numeric

CREATE FIELD

The Numeric field type on the Field Types settings page.

4. Enter a name for the field as it will appear on an object type in **Field Name**.
5. **Optional:** If needed, provide additional information or instructions on completing the field in the **Long Name** section, which can be displayed on configurable forms.

Field Type

Numeric

Field Name

Time Spent (Hrs)

Long Name ?

The Name and Long Name fields.

6. **Optional:** Enter a minimum number of characters the user must enter in the field. If you select a maximum number of characters in step 7 below, the minimum number must less than or equal to the maximum.
7. **Optional:** Enter a maximum number of characters the user can enter in the field. If you selected a minimum number of characters in step 6 above, the maximum number must less than or equal to the minimum.

Minimum Characters

e.g. 10, 140, etc.

Minimum Characters is optional. It must be a whole number less than or equal to Maximum Characters (if set).

Maximum Characters

200

Maximum Characters is optional. It must be a whole number greater than or equal to Minimum Characters (if set).

The Minimum and Maximum Characters fields within a new plain text field.



Though the **Number Type** dropdown displays **Number**, **Currency**, **Percent**, and **Phone Number**, only **Number** can be selected, as the remainder of the options are currently in beta testing.

8. Use the **Preview** section to confirm the field is correct.

PREVIEW

Time Spent (Hrs)

The Preview section of a new numeric field. You can enter sample text in this field to confirm if the field settings, such as minimum or maximum characters, are correct.

9. Click **Create**.

Date & Time Fields

The **Date & Time** field allows users to select the date or the date and time from a pop out calendar. All dates and times are stored and displayed in UTC format.



Once a Date & Time field is created, you cannot edit its format to add or remove the time.

The screenshot shows a form field labeled "Date Incident Occurred". A calendar pop-up is displayed, showing the month of July 2018. The date 12 is selected and circled. Below the calendar, the time 12 : 48 pm is displayed. The calendar has a header with "July 2018", navigation arrows, and a "TODAY" button. The days of the week are listed as Sun, Mon, Tue, Wed, Thu, Fri, Sat. The dates 1 through 31 are arranged in a grid. The time display has up and down arrows for each part of the time.

The Date & Time field on an object.

To create a date and time field:



1. Click the  icon in the top bar > **Fields** in the **Data Model** section.
2. Click **Create Field**.
3. Hover your cursor over the **Date & Time** field type, then click **Create Field**.

Date & Time

A picker that allows selection of a date and optional time.

Date & Time

CREATE FIELD

The Date & Time field type on the Field Types page.

- Enter a name for the field as it will appear on an object type in **Field Name**.
- Optional:** If needed, provide additional information or instructions on completing the field in the **Long Name** section, which can be displayed on configurable forms.

Field Type

Date & Time

Field Name

Date Incident Occurred

Long Name ?

The Name and Long Name fields.

- Select the date and time format from the **Date & Time Format** dropdown menu. If you **don't** want a time to appear in this field, select the **YYYY-MM-DD**, **MM/DD/YYYY**, or **Month Day, Year** formats. Note that once the field is created, you will not be able to edit the format to include or remove the time.

Date & Time Format

2017-03-20
2017-03-20
2017-03-20 13:46
03/20/2017
March 20, 2017
March 20, 2017 1:46 pm

- Use the **Preview** section to confirm the field is correct. Click the field to preview how the date and time will be displayed.

PREVIEW

Date Incident Occurred



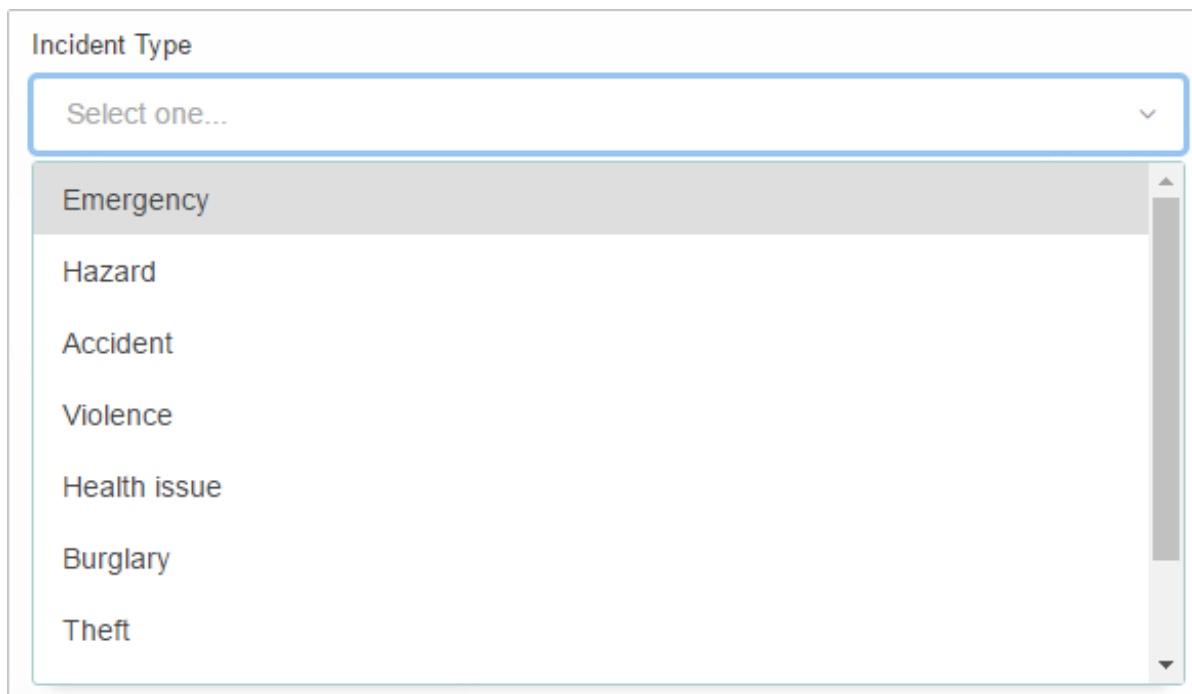
The Preview section of a new date and time field. You can select a sample date and time in this field to confirm the settings are correct.

8. Click **Create**.

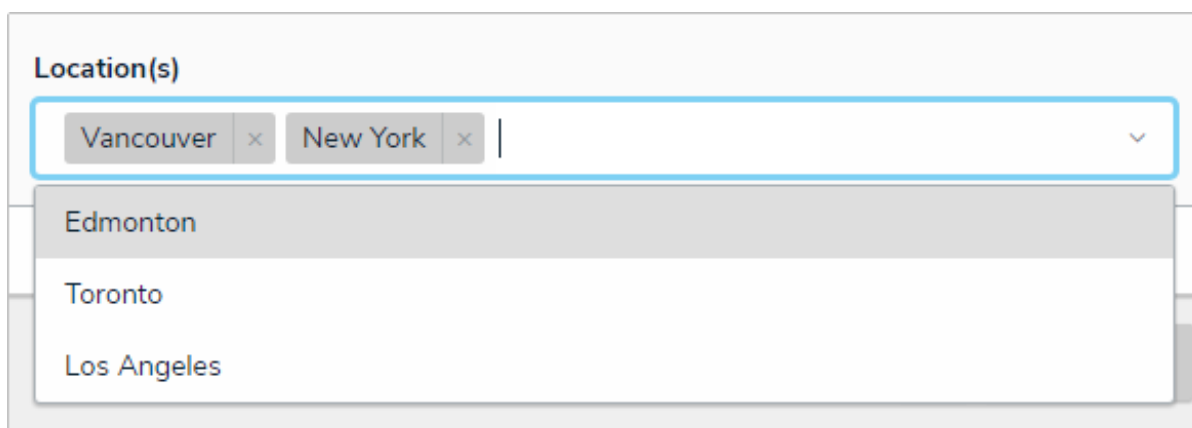
Select List Fields

A **select list** is a dropdown menu that displays the options you've created and added to the field. You can choose to create a single select list (users can only select one option from the field) or a multi-select list (users can select multiple options from the field).

This field type can also be used in [formulas](#) , provided the options in the select list contain a numeric value (see step 12 below).

A screenshot of a single select list field. The field is titled "Incident Type" in a bold, dark font. Below the title is a dropdown menu with a light blue border. The dropdown is currently open, showing a list of options: "Emergency", "Hazard", "Accident", "Violence", "Health issue", "Burglary", and "Theft". The "Emergency" option is highlighted with a grey background. The dropdown menu has a small downward arrow icon on the right side.

A select list field on an object.

A screenshot of a multi-select list field. The field is titled "Location(s)" in a bold, dark font. Below the title is a multi-select dropdown menu with a light blue border. The dropdown is currently open, showing a list of options: "Edmonton", "Toronto", and "Los Angeles". The "Edmonton" option is highlighted with a grey background. The dropdown menu has a small downward arrow icon on the right side. Above the dropdown, there are two selected items: "Vancouver" and "New York", each with a small 'x' icon to its right.

A multi-select list field on an object.

To create a new select list:

1. Click the  icon in the top bar > **Fields** in the **Data Model** section.
2. Click **Create Field**.
3. Hover your cursor over the **Select List** field type, then click **Create Field**.



The Select List field type on the Field Types settings page.

4. Enter a name for the field as it will appear on an object type in **Field Name**.
5. **Optional:** If needed, provide additional information or instructions on completing the field in the **Long Name** section, which can be displayed on configurable forms.

The Name and Long Name fields.

6. Select either **Single** or **Multi** from the **Selection Type** dropdown menu. A **single** select list means the user can only select one option, while a **multi** select list allows the user to choose more than one option.
7. Ensure the **Add Options** tab has been selected.
8. Enter the options that will appear in the dropdown menu. Each option must be separated by a line break by pressing **Enter** on your keyboard.

Current Options (0)

Add Options

Field Options

Emergency
Hazard
Accident
Violence
Health Issue
Burglary
Theft

+ ADD OPTIONS

Options to be added to the select list.

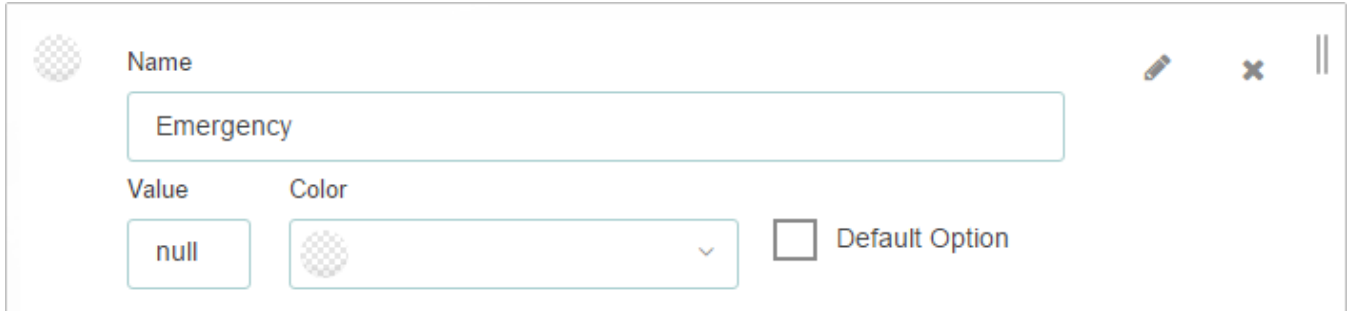
- Click the **Add Options** button. This will automatically select the **Current Options** tab.

Current Options (7)

Add Options

	Emergency			
	Hazard			
	Accident			
	Violence			
	Health Issue			
	Burglary			
	Theft			

10. Click the  icon next to an option to view the settings for an option.



The screenshot shows a settings dialog for a select list option. At the top left is a circular icon with a grid pattern. To its right is the 'Name' label and a text input field containing 'Emergency'. To the right of the 'Name' field are three icons: a pencil, an 'x', and a vertical bar. Below the 'Name' field are two labels, 'Value' and 'Color'. Under 'Value' is a text input field containing 'null'. Under 'Color' is a dropdown menu with a circular icon and a downward arrow. To the right of the 'Color' dropdown is a checkbox labeled 'Default Option'.

An option's settings within a select list.

11. Enter an alternate name for the option in the **Name** field, if needed.
12. If this select list is to be used in a [formula](#), enter a number for the option in the **Value** field. Repeat this step for each option.



A formula will display an **Invalid Result** error if it attempts to pull data from a select list option that does not have a value. To avoid this, ensure a numeric value is applied to all select list options.

13. Click the **Color** dropdown menu to reveal the color picker. You can either click a color to select it or type a hex color into this field. This color will appear next to the options in the select list dropdown menu.
14. Select the **Default Option** checkbox if you want the option to be automatically selected in the list when it appears on the object type. If changing the default option on a select list previously saved on one or more objects, note that:
- If the select list on the object shows a value (option), the value **will not** be updated to reflect the new default.
 - If the select list on an object shows the previous default value (option), the previous default **will not** be updated to reflect the new default.
 - If the select list on an object does not show a value (option), default or otherwise it **will** be updated to reflect the new default.
15. Click the  icon to close the settings for that option.
16. Repeat steps 9-14 to continue editing the options as needed.
17. To rearrange the order the options will appear on the select list, click and drag the  icon next to an option.
18. To delete an option, click the  icon.
19. Use the **Preview** section to confirm the field is correct.

PREVIEW

Incident Type

Select one...

- Emergency
- Hazard
- Accident
- Violence
- Health Issue
- Burglary
- Theft

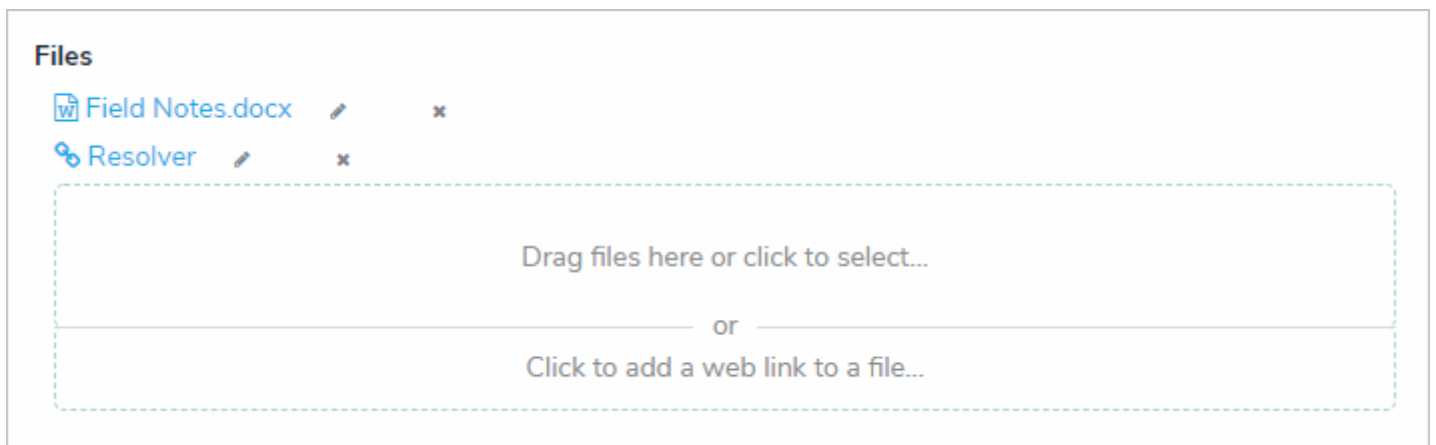
The Preview section of a new select list. Click on the field to confirm the options are displaying correctly.

20. Click **Create**.

Attachments

The **attachments** field allows users to upload files, URLs (web links), or both to an object. Most files are accepted by the attachments field, however, you cannot upload files with the following extensions:

- .bat
- .exe
- .gif
- .sh
- .dll
- .com



An attachment field (file and web link).

When the **File only** or **File and web link** option is selected in the field's settings, users can upload files (up to 100MB in size) or web links by clicking the file or web link upload area on an form (as shown in the screenshot above).

If the **Web link only** option is selected, users can upload a link by clicking by clicking the  the icon (as shown in the screenshot below). If the optional display name for the web link is not included, the full URL will be displayed. Clicking the link will open the site in a new tab in your browser.

This field type cannot be embedded as a variable in an [email template](#).

An attachment field with the Web link only option selected.

To create an attachment field:

1. Click the  icon in the top bar > **Fields** in the **Data Model** section.
2. Click **Create Field**.
3. Hover your cursor over the **Attachment** field type, then click **Create Field**.

The Attachment field option after clicking Create Field.

4. Enter a name for the field as it will appear on an object type in **Field Name**.
5. **Optional:** If needed, provide additional information or instructions on completing the field in the **Long Name** section. You can choose to display a field's long name on configurable forms.

Field Type

Attachments

Field Name

Files

Long Name ?

The Name and Long Name fields.

6. Select one of the following options from the **Attachment Type** section:

- **File only:** Users can upload files (up to 100MB in size) to an object.
- **Web link only:** Users can upload URLs to an object.
- **File and web link:** Users can upload files (up to 100MB in size) and URLs to an object.

Attachment Type

☐ File only
☐ Web link only
☒ File and web link

The Attachment Type section.

7. Use the **Preview** section to confirm the field is correct.



You can click or drag and drop files into the upload area to test the attachment field, however, you will not be able to successfully upload a file as this is a preview only.

8. Click **Create**.

Image Attachment

The attachments field allows users to upload image files to an object and display the image directly on the form. Once an image is uploaded to an object, the user can edit the name, add a description, or change, delete, or crop the image. This field accepts the following image file types:

- .JPEG
- .GIF
- .PNG

Note that you can upload images through the [Attachments](#) field, but the image will not be displayed on the form. This field type cannot be embedded as a variable in an [email template](#).

Person Photo

Drag images here or click to select...

An image attachment field on an object.

Weight (lbs)

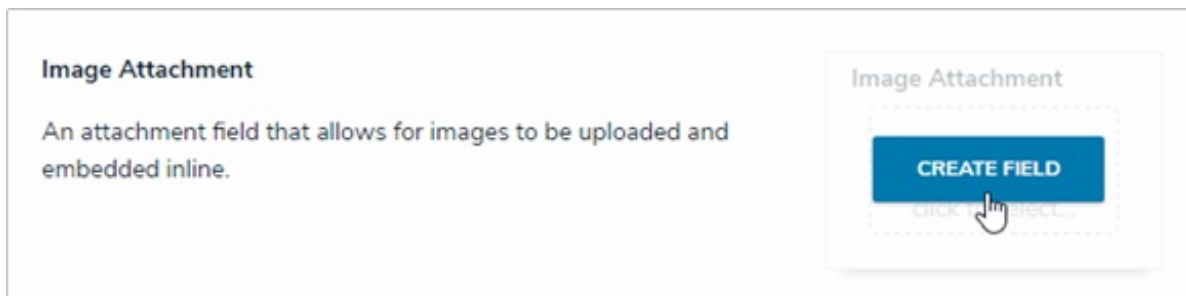
Person Photo


Incidents this person was involved in

An image attachment field on an object with an image uploaded.

To create an image attachment field:

1. Click the  icon in the top bar > **Fields** in the **Data Model** section.
2. Click **Create Field**.
3. Hover your cursor over the **Image Attachment** field type, then click **Create Field**.



The Image Attachment field option after clicking Create Field.

4. Enter a name for the field as it will appear on an object type in **Field Name**.
5. **Optional:** If needed, provide additional information or instructions on completing the field in the **Long Name** section, which can be styled using [Markdown](#). You can choose to display a field's long name on configurable forms.



The Name and Long Name fields.

6. Use the **Preview** section to confirm the field is correct.



You can click or drag and drop files into the upload area to test the attachment field, however, you will not be able to successfully upload a file as this is a preview only.

7. Click **Create**.

Edit or Delete a Field

To edit or delete a field:

1. Click the  icon in the top bar > **Fields** in the **Data Model** section.
2. Enter the name of the field in the **Search** field or click on a field in the list.
3. Make changes to the field's name as needed, including the **Field Name** and **Long Name**.

 If needed, you can change the field's unique name by clicking the  icon next to the **Unique Name** field to unlock and edit it, however, it's **strongly recommended** that you do not change the unique name as its default value is used throughout the CORE system and altering it may interfere with existing data.

4. Make any other changes to the field as needed.
5. To delete the field, click the  icon, then click **Yes** to confirm.
6. Click **Done** when finished.



If the field has been **added** to one or more object types, those object types will appear in the **Related Object Types** section at the bottom of the **Editing Field** page. Click the object type to view its **Edit Object Type** page.

Assessments Overview

Assessments allows users to collect, review, and assess object data (e.g. audit, investigation, control assessment, etc.) continuously or from a particular point in time, from different dimensions (e.g. locations, business units, quarters, etc.).

Though there are some additional features and configurations, assessments have functionality similar to object types and with them you can:

- Configure their [workflows](#) ;
- Add components;
- Create [configurable forms](#) or [reports](#);
- Create an assessment object through an [activity](#) or [Quick Create](#) ;
- Add them to [object type groups](#) , [roles](#) , [actions](#), or [views](#) ;
- [Search](#) for assessment objects; and
- Create or update assessment data through [Data Import](#) .

The data added to an assessment is defined by a **focus** object type (similar to an [anchor](#) on a report), a **data definition** (also similar to [data definitions](#) on a report) and **dimensions** (which help you categorize the data). Assessments are then added to an action where users can input the assessment name. A [navigation form](#) is then launched, which allows users to view, filter, and explore objects to add to the assessment, before creation (launch). See the [Scope & Launch Overview](#) article for more information.

EXAMPLE

Your organization has a number of compliance processes in place. To ensure the processes and their controls are effective, they must be regularly reviewed by each office location. To do this, you would create an assessment, titled Control Assessment, with the Process object type as the focus. Through the data definition, you select the Control object type which is related to Process through a relationship, then create a Location custom dimension, with an option for each office location in your company. Lastly, you add components to the assessment, just as you would for an object type, which includes a select list that summarizes the overall effectiveness of the controls. Once the new assessment has been added to an action, users can generate assessment data based on a selected process, location, and control, then determine if the controls are effective based on the formula.

CONTROL ASSESSMENT



Assessments of our processes and control effectiveness by each office location.

FOCUS AND DATA



Process

Choose a Data Definition

Process and Controls ▾

CREATE NEW

DIMENSIONS

Object type dimension(s)

Select one... ▾

+ ADD SELECTED (0)

Custom dimension(s)

Select one... ▾

+ CREATE NEW

Control



Location



Overview

Workflow

Fields (0)

Formulas (1)

Relationships (2)

References (1)

Roles (0)

Summary information about the Object Type: related forms, object type groups, activities / applications, Reports, report definitions...

Related Forms

The Edit Assessment page. In this case, the focus object type is Process, the Control object type was added through the data definition, and Location is a custom dimension.

Create Risk Assessment

Create a New Risk Assessment

Risk Assessment Name

Time ?

Business Unit ?

CREATE

CANCEL

A new assessment before scope and launch.

Creating an assessment includes the following steps:

1. Create and configure the [object types](#) that will be used in the assessment.
2. [Create](#) an assessment:
 - a. Select a [focus, data definition, and dimensions](#) .
 - b. Configure the [workflow](#) for the assessment and any other object types in the assessment.
 - c. Add components (fields, formulas, relationships, and roles). See the [Object Types](#) section for more information on adding each component.
3. Add the assessment to each applicable [role](#) , then configure its [permissions](#) , including any [inferred permissions](#) . Ensure **Manage** permissions have been enabled for each role that will be creating assessments.
4. Create a new [navigation form](#) using the same data definition selected on the assessment.
5. Create a [configurable form](#) for the assessment and add the [Assessment Context](#) element and [Open Assessment Scoping](#) action to the form.
6. **Optional:** Add the [Assessment Dimension](#) property to the form of an object type that was used as a dimension or reference object on a previous assessment. Adding this property will display the assessment data as a read-only reference.
7. Add the assessment to an [action](#) so users can create assessment objects through an activity.
8. **Optional:** Add the assessment to a [view](#) to display the existing assessment objects through an activity.
9. **Optional:** Add assessment data to a form to view past assessment data through an [Assessment Table](#) .
10. **Optional:** Add the assessment to a [report](#) to analyze its data.

Focus, Data Definition & Dimensions

When creating an assessment, you must first select an object type to use as the **focus**, which determines which object types you can select when creating a **data definition**.

The [data definition](#) allows you to choose which additional object type(s) an assessment's data is drawn from using the focus object type's Data Path. The **Data Path** displays all the [relationships](#) and [references](#) associated with the focus object type, so you can select any related object types that you may want in the assessment. When object types are selected through the data definition, you can configure or create new workflows for them or flag them as reference data.

To categorize the assessment data, the following dimensions (assessment context) can be added:

- **Object Type Dimensions:** Allows users to add existing object types outside the data definition to the assessment as context (e.g. Business Unit). Users cannot create new objects through object type dimensions, but can view or edit the objects when scoping the assessment.
- **Custom Dimensions:** Similar to a [select list](#), this dimension type appears on an assessment as a dropdown menu with options that you define in the **Custom Dimension** settings.

Both custom and object type dimensions appear on assessment forms as required fields, however, users are required to complete only one dimension before [scoping](#). If scoping has not been enabled on the assessment, all dimension fields must be completed before the assessment is created. Any selections made in the dimension fields cannot be modified once the assessment has been saved.

Admin : Edit Data Definition

CONTROLS > PROCESSES > LOCATIONS

DEFINITION
This is for reference only, and cannot be modified

- [-] **C** Control ✓
- [-] Controls (Reference)
- [-] **P** Process ✓
- [-] Locations
- [-] **L** Location ✓

The data path of a definition. The selected object types in the path determine which dimensions can be added to an assessment.

Name

Description

Select Process ?

Search for a Process

Location ?

Select one...

✕

Control Frequency

Select one...

Control Effectiveness

Select one...

Control Revision/Review

Select one...

Overall Effectiveness

-- not calculated --

↺

CREATE

A new blank assessment object with Process as the focus object type and Location as a custom dimension.



You can check if an object type is associated with any data definitions by going to **Administration > Object Types**, clicking the object type to open the **Edit Object Type** page, then reviewing the **Related Data Definitions** section in the **Overview** tab. You can also view all the data definitions in your org in the [Data Definitions](#) section in **Administration**.

Instances & Reference Data

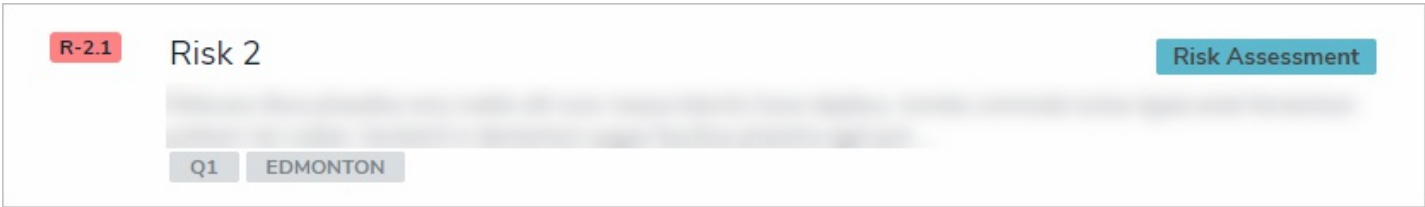
Once an assessment object is created, **instances** of each existing assessed (**focus**) objects are automatically created. Instances are saved to the assessment and have the same data as the original objects, except they're assigned unique IDs that are .1 number higher than the original, with any additional instances on the same object being assigned IDs that continue incrementally (e.g. .2, .3, .4, etc.). You can identify instances in a **view** because they display the dimensions from the related assessment below their names. For example, selecting the Payroll object with a unique ID of P-5 on an assessment will result in an automatically created instance of that object with the same data, but with a unique ID of P-5.1 and the Edmonton (Location) dimension displayed on the view. Instances from previous assessments can be reassessed. When this happens, an additional .1 increment is added to the instance's unique ID (e.g. P-5.1.1).

If objects in an assessment should **not** have instances created, administrators can flag object types in the selected data definition as **references**. Reference data in an assessment is considered to be important, secondary data that needs to be included, but not actually assessed. If a relationship between the assessment and a reference object type has been created, the **relationship** and **reference** form elements can be used to view, add, or edit data on a reference object.

Examples of assessment reference data include business units, locations, departments, products, teams, or legislations. Object types are flagged as references in the **Workflow** tab on the **Edit Assessment** page. See [Configure an Assessment's Workflows](#) for more information.

EXAMPLE

Because you're creating an assessment that evaluates your company's processes and the effectiveness of their controls at each office location, the focus object type of your assessment would be the Process object type. The data definition would then display all the object types related to Process through relationships and references where you would select the Control and Location object types. The Process and Location object types are used to create dimensions on the assessment, but Location is flagged as reference data. Now when a user selects a particular Process object when creating a new assessment, both the Process and Control objects will have new instances created. Meanwhile, because the Location object type was flagged as reference data, it appears on the assessment, but no instances of the Location object are created.



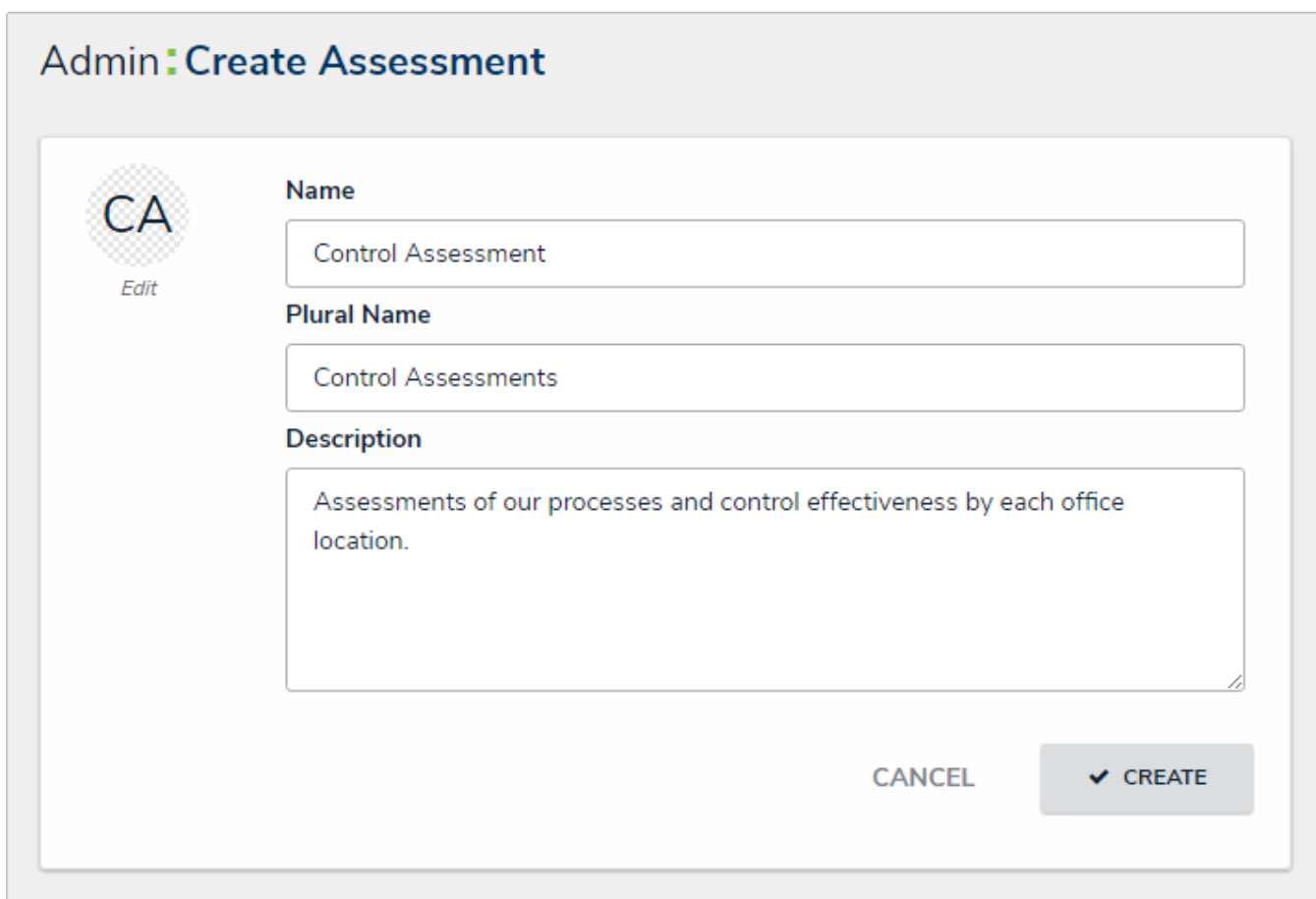
An example of an instance in a view, identifiable by the .1 increment added to the unique ID and the assessment dimensions (in this case, Q1 and Edmonton).

Create a New Assessment Type

Once an assessment type has been created, you can add it to reports, object type groups, relationships, roles, configurable forms, and actions and views.

To create a new assessment type:

1. Click the  icon in the top bar > **Assessments** in the **Data Model** section.
2. Enter a name for the assessment in the **Name** field.
3. **Optional:** Enter a plural name for the assessment type in the **Plural Name** field, which will appear when viewing a list of the objects for the assessment (e.g. "View Control Assessments" instead of "View Control Assessment").
4. **Optional:** Enter a description of the assessment type in the **Description** field, which will appear on the **Assessments** and **Edit Assessment** pages.



The Create Assessment page.

5. **Optional:** To edit the assessment monogram:
 - a. Click the monogram icon to the left of the **Name** field.
 - b. Enter 1 to 3 characters in the **Monogram** field.
 - c. Click the **Pick a color** dropdown menu to reveal the color picker. You can also type a hex color into this field to select a color.

Customize Monogram

Monogram

CA

Pick a color

#4a5960

✓ DONE

The Customize Monogram screen.

- d. Click **Done**.
6. Click **Create** to display the **Edit Assessment** page.
7. Select an object type to use as the assessment's **focus** from the **Choose an assessment focus** dropdown menu. The focus object type determines which object types you can select when creating or selecting a **data definition**.
8. Click **Set Focus**.

FOCUS AND DATA

Choose an assessment focus

Process

SET FOCUS

The Focus dropdown menu. The object type selected here will determine which data definition can be selected for the assessment.

 Once you've clicked **Set Focus**, you cannot modify your selection.

9. To choose an existing data definition, select it from the **Choose a Data Definition** dropdown menu.
10. To create a new data definition:
 - a. Click **Create New** to open the **Create Data Definition** panel.

FOCUS

P

Process

Choose a Data Definition

Select one... ▾

CREATE NEW

The Data Definition section, which appears after selecting a focus.

- Enter the name for the definition in the **Name** field.
- Optional:** Enter a description for the definition in the **Description** field. This description will appear when reviewing the [Data Definition](#) settings.

CREATE DATA DEFINITION

Name

Process and Control

Description

The Create Data Definition screen.

- Click the monogram, which represents the focus object type you're currently working in, to expand the node and any reveal relationships and references saved to the focus object type.

Select Data Paths

Clicking relationship and object type nodes below will define the paths that act as your data definition

+

P

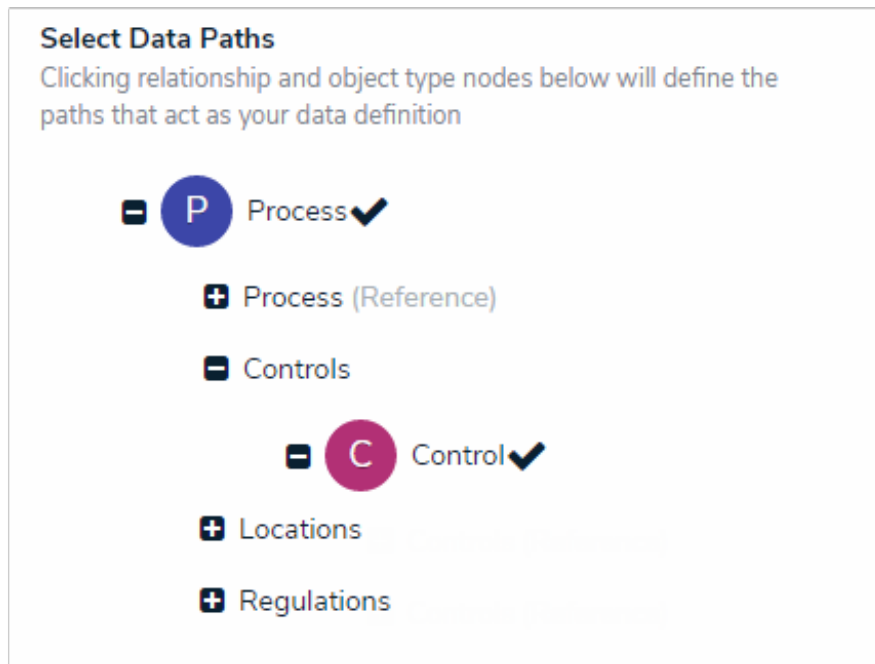
Process

CANCEL

✓ CREATE

The Data Path with no object types selected. Clicking the monogram of the focus object type will expand the tree to show all the relationships and references.

- e. Click a relationship or reference to show the related object types (e.g. clicking the “Controls” relationship will reveal the Control object type).
- f. Click an object type to place a checkmark next to it and add the object type to the [data definition](#) . Any object types selected in the data definition can be used as [dimensions](#) or [reference data](#) on the assessment. For example, if you selected Process as the focus and Control in the data definition, both Process and Control can be added as dimensions.



Selecting object types on a new data definition. The object types selected can then be used as dimensions or reference data.

- g. Continue placing checkmarks beside the object types as needed.
- h. Click **Create** to close the palette.



You can review the data path of the definition from the [Data Definitions](#) section in **Administration**.

- 11. To create a [dimension](#) from an existing object type (that will appear on the assessment as a field through which users can select an existing object type):
 - a. Click the dropdown menu below **Object Type Dimension(s)**, then select one or more object types that you want to appear on the assessment (e.g. selecting the Location object type will add fields on the assessment through which users can only select existing Location objects).
 - b. Click **Add Selected**.

Adding object type dimensions to an assessment.

12. To create a custom dimension, which will appear on the assessment as a dropdown menu with predefined options (similar to a [select list](#)) and will **not** allow users to select existing objects:
 - a. Click **Create New** from the dropdown menu below **Custom Dimension(s)**.
 - b. Enter a name in the **Dimension Name** field (e.g. Location).
 - c. Enter the name for an option as it will appear in the dimension (e.g. Edmonton).
 - d. Click **Add Another Dimension Option** to continue adding options.

The Create Dimension screen for custom dimensions.

- e. Click **Create**.
13. Click the **Workflow** tab. From here you can configure the assessment workflow, configure or create new workflows for

focus object types (object types toggled as on in the **Assessment Data** column), or flag object types as [reference data](#) . The object types on this tab are populated based on the object types selected in the assessment's data definition. See the [Configure an Assessment's Workflows](#) for more detailed information.

Overview	Workflow	Fields (0)	Formulas (0)	Relationships (1)	References (0)	Roles (0)
Object Type	Assessment Data ?	Workflow Name				
Control Assessment (Assessment)		Control Assessment Workflow		⚙️ CONFIGURE		
Process (Focus)	✓ ■	Process (Library) ▼		⚙️ CONFIGURE + NEW		
Control	✓ ■	Control Status (Library) ▼		⚙️ CONFIGURE + NEW		
Issue	■ ✕	Issue Status (Library) ▼				

The Workflow tab on the Edit Assessment page.

- Click the **Fields** tab to add [fields](#) to the assessment.
- Click the **Formulas** tab to add [formulas](#) to the assessment.
- Click the **Relationships** tab to add [relationships](#) to the assessment.

✓

To help indicate an object type is the focus of an assessment, a relationship between the assessment and the focus object type is automatically created on the assessment, which will then allow you to add a [reference](#) on the focus object type, if needed.

- Click the **Roles** tab to add [roles](#) and configure the [inferred permissions](#) on the assessment.
- Click **Done**.
- Create a **navigation form** to complete the scope and launch of the assessment.
- Create a [standard configurable form](#) for the assessment, ensuring you've added the [Assessment Context](#) element and the [Open Assessment Scoping](#) action to the form.
- Add the assessment to an [action](#) so assessment objects can be created through an activity.
- Optional:** Add the assessment to a [view](#) so existing assessment objects can be viewed through an activity.

Configure Assessment Workflows

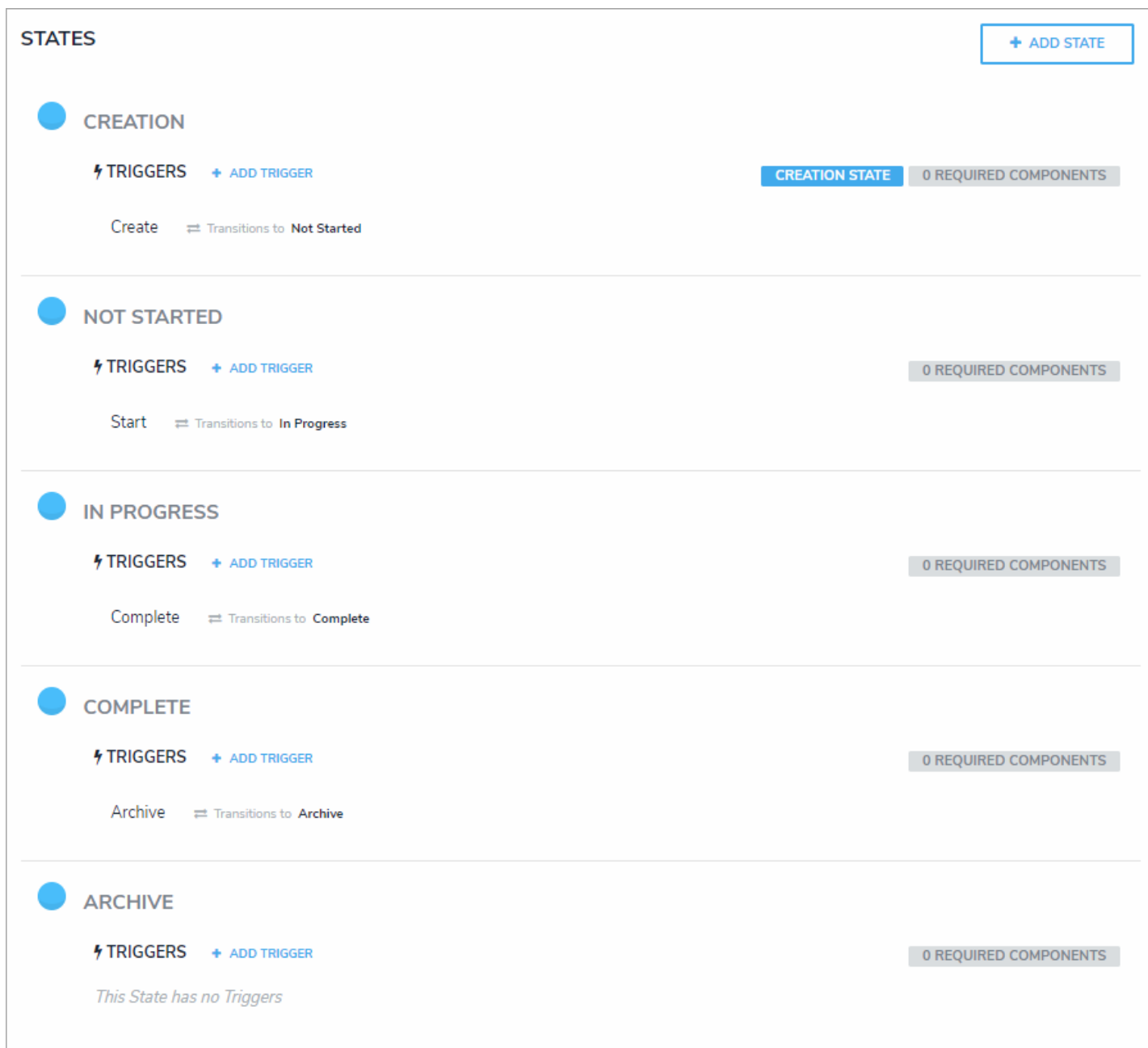
Because objects in an assessment may require different processes depending on the assessment type (e.g. Audit versus ERM), administrators can configure unique workflows for object types added to assessments.

While assessments can only have one workflow, the object types added to an assessment can have multiple. Additional workflows can only be created in the **Workflow** tab on the **Edit Assessment** page, however, once a workflow is created, it can be used for the object type on any other assessments (if that object type has been added to the data definition). The states in those additional workflows can be used to filter the objects displayed in [views](#) , [reports](#) , or [search](#) results.

The primary workflow created for each object type outside of an assessment is identified in the **Workflow** tab as **[Object Type Name] (Library)**. When you create a new workflow for an object type from the **Edit Assessment** page, you can reuse that workflow in other assessments, views, report filters and parameters, and search. Reusing previously created assessment workflows is useful when an object type has similar processes across more than one assessment. For example, if the Control object type was used in the Control Self Assessment, an administrator could select that assessment's workflow when Control was used in an Audit assessment.

Each new assessment and object type is created with an automatically generated workflow that includes the following [states](#) , [triggers](#) , and [transitions](#) that can be edited, deleted, or replaced (except **Creation**):

1. **Creation:** Contains a **Create** button trigger that transitions the object to the **Not Started** state. This state cannot be deleted nor can its name or color be edited, however, the trigger can be edited or replaced as needed.
2. **Not Started:** Contains a **Start** button trigger that transitions the object to the **In Progress** state.
3. **In Progress:** Contains a **Complete** button trigger that transitions the object to the **Complete** state.
4. **Complete:** Contains a **Archive** button trigger that transitions the object to the **Archive** state.
5. **Archive:** This state contains no triggers or transitions.



The standard workflow that's created with each new assessment and object type.

The object types available in the **Workflow** tab on the **Edit Assessment** page are populated based on the [data definition](#) selected when creating the new assessment. From this tab, you can also specify whether these object types' data should actually be assessed and have [instances](#) created or should be used only as [reference data](#). Note that you cannot create or configure workflows for object types used as reference data in assessments.

To configure an assessment's workflow(s):

1. Click the  icon in the top bar > **Assessments** in the **Data Model** section.
2. Click the assessment or enter the name of the assessment in the **Search** field, then click it to display the **Edit Assessment** page.
3. Click the **Workflow** tab near the bottom of the page to display the object types in the assessment's data definition.

Overview Workflow Fields (4) Formulas (0) Relationships (2) References (0) Roles (0)				
Object Type	Assessment Data	Workflow Name		
Risk Assessment (Assessment)		Risk Assessment Workflow		CONFIGURE
Process (Focus)		Process Status (Library)	CONFIGURE	+ NEW
Sub Process		Sub Process Status (Library)	CONFIGURE	+ NEW
Risk		Risk Library Workflow (Library)		
Issue		Issue Status (Library)		
Control		Control Status (Library)		

The Workflow tab on the Edit Assessment page. The object types in this tab are populated based on the data definition selected for the assessment.

4. To toggle an object type on or off as [reference data](#) :

- a. Click the icon beside an object type to toggle it and any relationship and reference object types below it, as off. To toggle an object type as on, click the icon.



You cannot configure the workflows of object types flagged as reference data in assessments.

5. To edit an existing workflow:

- a. Click **Configure** in the row for the assessment or appropriate object type on the **Edit Workflow** page. If an object type has multiple workflows, select it from the dropdown menu in the **Workflow Name** column, then click **Configure**.
- b. Make adjustments to the workflow states, triggers, transitions, and actions as needed. See [Workflows](#) for more information on configuring these settings.

6. To create a new workflow for object types that are **not** flagged as reference data, click **New** in the row for the appropriate object type. See [Workflows](#) for more information on creating a new workflow.

7. Click **Done** when finished to return to the **Edit Assessment** page.

Edit or Delete an Assessment Type

You can edit or delete an assessment type and most of its settings **provided that the assessment has not been launched**. Once an assessment is launched, the assessment and the following data associated with it will be locked, including:

- Object types;
- Dimensions;
- Formulas, relationships, or roles; or
- Object type groups.

This article provides instructions for editing or deleting an assessment that has **not** been launched. To edit or delete any of the above data after an assessment has been launched, the assessment, the assessment objects, and [instances](#) must first be deleted. See the [Delete a Launched Assessment Type](#) for more information. For information on deleting individual assessment objects and their instances, see the [Delete a Launched Assessment Object](#) article.

To edit or delete an assessment:

1. Click the  icon in the top bar > **Assessments** in the **Data Model** section.
2. Click the assessment or enter the name of the assessment in the **Search** field, then click it to display the **Edit Assessment** page.
3. To edit the assessment's name, description, or monogram, click the  icon next to the assessment's name at the top of the page.
4. To edit the data definition, select an existing definition from the **Choose a Data Definition** dropdown menu or click **Create New** to create a new one.



Selecting a new data definition will reset any configured workflows on your assessment.

5. To add a new custom dimension, select an existing custom dimension from the dropdown menu in the **Custom dimension(s)** section or click **Create New** to add a new dimension.
6. To add a new object type dimension, select an object type from the dropdown menu in the **Object type dimension(s)** dropdown menu, then click **Add Selected**.
7. To delete either a custom or object type dimension from the assessment, click the  icon beside the dimension.
8. Click the tabs at bottom of the page to add, edit, or delete the components, including the workflows, of the assessment.
9. To delete the assessment, click the  icon, then **Yes** to confirm.

Delete a Launched Assessment Object

Deleting an assessment object will delete the individual object, together with all of its [instances](#) and [reference](#) data. To delete an assessment object, you must have:

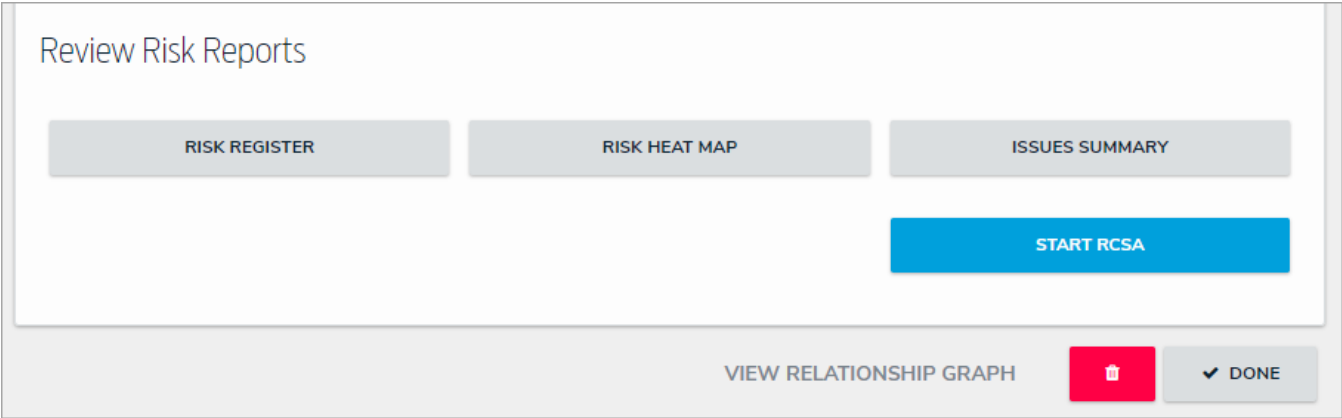
- Administrative privileges enabled on your [user account](#) ; and
- The assessment type added to your [role](#) with [Delete](#) permissions enabled for all states for the assessment type and object types included in the assessment [OR All Access](#) enabled on your user account.

Deleting an assessment object will **not** delete the assessment type. To delete a launched assessment type and all its objects and instances, see the [Delete a Launched Assessment](#) article. To delete an assessment that has not yet been launched, see [Edit or Delete an Assessment](#) .

To delete an assessment object:

1. Open the assessment object by navigating to it in a [view](#) or using the [search](#) tool.

2. Scroll to the bottom of the page to locate the  icon.



The Delete icon at the bottom of an assessment object.

3. Click the icon to display the **Confirm Delete** window and review the number of objects (including instances) in the assessment that will also be deleted.

 **Referenced objects** mapped to the assessment are **not** deleted.

4. Type **yes** in the text field (not case-sensitive), then click **Delete**.

Delete a Launched Assessment Type

Deleting an assessment type will also delete all objects and instances associated with the assessment. To delete an assessment type, you must have:

- Administrative privileges enabled on your [user account](#) ; and
- The assessment type added to your [role](#) with [Delete](#) permissions enabled for all states for the assessment type and object types included in the assessment [OR All Access](#) enabled on your user account.

To delete an individual assessment object and its instances, see the [Delete a Launched Assessment Object](#) article. To delete an assessment that has not yet been launched, see [Edit or Delete an Assessment](#) .

To delete a launched assessment type:

1. Click the  icon in the top bar > **Assessments** in the **Data Model** section.
2. Click the assessment or enter the name of the assessment in the **Search** field, then click it to display the **Edit Assessment** page.
3. Click **Delete All** at the top-right of the page to the **Confirm Delete** screen.



The Delete All option on the Edit Assessment page.



If **Delete All** is not visible, ensure your account has admin privileges. Additionally, [Delete](#) permissions must be enabled on your role for all the assessment workflow states [OR All Access](#) must be enabled on your account.

4. Type **yes** in the text field (not case-sensitive), then click **Delete ALL**.



Deleting an assessment will delete **all** its objects and instances. [Referenced objects](#) mapped to the assessment are not deleted.

Scope & Launch Overview

When referring to assessments, **scope** refers to end users refining what will be assessed by selecting specific objects or **instances**, while **launch** means fully creating an assessment after completing all the steps required by end users.

To scope, a user creates a basic assessment by entering a name and selecting at least one **dimension**, along with any other fields added to the assessment form. After moving the assessment out of the **Creation** state, they then click the **Open Assessment Scoping** form action to select objects and/or instances from the assessment **focus** object type(s). The data is further filtered through the use of a **navigation form**. The tree view on the form helps users decide if related objects are relevant and allows them to add or remove those objects from the assessment. Depending on the user's **permissions**, the navigation form can also allow review and editing of an object through a palette.

Navigation forms are not required when launching assessments as it's possible to use a [standard form](#) with the [Assessment Context](#) element to create new assessments, however, **navigation forms are recommended under most circumstances**. See the [Navigation Form](#) article for more information.

For information on the steps an administrator must take to allow for the scope and launch of an assessment, see the [Scope & Launch Requirements](#) article. For information on the steps an end user must take to complete an assessment, see the [Scope & Launch/Create an Assessment](#) article.

Q3 2018 Assessment: Toronto

2018 - Q1 - Time Period
Toronto - Business Unit

Add a Risk Category to your assessment from the list below. If it's necessary, you can add multiple Risk Categories to focus on. You'll be able to perform more granular scoping before you confirm the scope of your assessment.

Filters

By Name

By Assessment Type

Select one...

By Dimension

Select one...

By Description

By Unique ID

By state

Select one...

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Operational

ACTIVE

We do this by enabling them to manage both risk and security across the enterprise in a single solution. Our intuitive integrated risk management software for mid to large-sized or...

+ ADD TO SCOPE

ASSESSMENTS

***	R&C Self Assessment	2018 - Q4	TORONTO	ASSESSMENT	- REMOVE FROM SCOPE
***	R&C Self Assessment	2018 - Q2	TORONTO	ASSESSMENT	+ ADD TO SCOPE
***	R&C Self Assessment	2018 - Q4	EDMONTON	ASSESSMENT	+ ADD TO SCOPE
***	R&C Self Assessment	2018 - Q4	EDMONTON	ASSESSMENT	+ ADD TO SCOPE
***	R&C Self Assessment	2018 - Q2	EDMONTON	ASSESSMENT	+ ADD TO SCOPE

LOAD MORE

Page 1 of 1 (1 to 1 of 1 items)

There are currently 36 objects added and ready for review

A navigation form used to scope an assessment prior to launch. After objects and instances are selected, clicking the green banner will display the navigation form.

There are currently 12 objects added and ready for review

FILTERS

REVIEW YOUR SCOPE

Take a look at the scope of your assessment by expanding the tree and seeing if you want to assess. To narrow the scope of your assessment, expand the nodes on the tree and then select or de-select specific items until you have exactly the data you want to assess selected.

Assessment details:
Risk Assessment — Risk
Assessment 36
Q1 - Time

Retain High-Quality Employees

Lack of social events

Control 1

Not having Coffee in the morning A...

Control 2

Control 3

Control 7

Not properly on boarding new empl...

CONFIRM SCOPE

The navigation form to allow further refinement of the assessed data.

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Scope & Launch Requirements

Before an assessment can be launched using the scoping tool, an administrator must complete the following steps:

1. [Create](#) and configure the assessment from the administrative settings.
2. Create a [navigation form](#) using the same [focus](#) object type or [data definition](#) as the assessment.
3. Create a [standard form](#) to be used when creating the assessment, ensuring the **Name** and **Assessment Dimension properties** have been added, along with the [Open Assessment Scoping](#) action with the appropriate navigation form selected.
4. Using the form from step 3 or a similar form with the **Open Assessment Scoping** action, create a [view](#) for the assessment in the **Not Started** state (or equivalent) to allow users to return to assessments that have not yet been scoped.
5. Add the assessment to an [action](#) , using the form in step 3 above to allow users to create new assessments.
6. Ensure the appropriate users' [roles](#) have been properly configured to access the assessment, actions, and views.

Scope & Launch User Interface

Scoping Tool

Q3 2018 Assessment: Toronto

2018 - Q1 - Time Period

Toronto - Business Unit

EDIT ASSESSMENT DETAILS

Add a Risk Category to your assessment from the list below. If it's necessary, you can add multiple Risk Categories to focus on. You'll be able to perform more granular scoping before you confirm the scope of your assessment.

Filters

By Name

By Assessment Type

Select one...

By Dimension

Select one...

By Description

By Unique ID

By state

Select one...

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ACTIVE

+ ADD TO SCOPE

ASSESSMENTS

R&C Self Assessment

2018 - Q4

TORONTO

ASSESSMENT

REMOVE FROM SCOPE

R&C Self Assessment

2018 - Q2

TORONTO

ASSESSMENT

+ ADD TO SCOPE

R&C Self Assessment

2018 - Q4

EDMONTON

ASSESSMENT

+ ADD TO SCOPE

R&C Self Assessment

2018 - Q4

EDMONTON

ASSESSMENT

+ ADD TO SCOPE

R&C Self Assessment

2018 - Q2

EDMONTON

ASSESSMENT

+ ADD TO SCOPE

LOAD MORE

Page 1 of 1 (1 to 1 of 1 items)

There are currently 19 objects added and ready for review

The scoping tool. This page is accessed by clicking an Open Assessment Scoping action on an assessment form.

1. The name of the assessment.
2. The **Edit Assessment Details** link. Clicking this link will return you to the assessment to edit or add information to the form.
3. The assessment's **dimensions** . These selections cannot be modified.
4. Filters that can refine the objects and **instances** displayed on the page.
5. **Focus** objects that can be added to the assessment.
6. The **Add To Scope** and **Remove From Scope** buttons to add or remove objects and instances from the assessment.
7. Instances of the object (past assessments) that can be added to the scope. If there are no existing assessment objects, this section will be hidden. Hovering your cursor over the ellipsis next to an instance will display its unique ID and the date it was created.
8. Displays the current number of objects and instances added to the scope (either directly by clicking the **Add To Scope** link or through relationships or references based on the assessment's **data definition**). Clicking this banner will display the navigation form.

Navigation Form

The screenshot displays the 'REVIEW YOUR SCOPE' interface. At the top, a green banner indicates 'There are currently 23 objects added and ready for review'. Below this, a 'FILTERS' section is visible. The main area shows a tree structure of objects and instances, each with a checkbox. The tree is organized as follows:

- Retain High-Quality Employees (checked)
 - Lack of social events (checked)
 - Not having Coffee in the morning A... (checked)
 - Control 2 (checked)
 - Control 3 (checked)
 - Control 7 (checked)
 - Issue 1 (checked)
 - Issue 2 (checked)
 - Issue 3 (checked)
 - Issue 9 (checked)
 - Issue 12 (checked)
 - Not properly on boarding new empl... (checked)

On the left, under 'Assessment details:', it shows 'Risk Assessment — Risk 42' and two tabs: 'Q2 - Time' and 'Toronto - Business Unit'. A 'CONFIRM SCOPE' button is located on the right. Numbered callouts 1 through 5 highlight specific UI elements: 1 points to the top banner, 2 to the filters icon, 3 to the tree collapse/expand icons, 4 to the 'CONFIRM SCOPE' button, and 5 to the assessment details section.

The assessment navigation form, which is accessed after adding objects and instances to the scope.

1. Displays the current number of objects and instances added to the scope from the scoping tool and through relationships and references. Clicking this banner will return you to the scoping tool.
2. Clicking this icon will display the available filters, based on the object type, that can be applied to refine the objects displayed in the tree.
3. Additional objects that can be added or removed from the scope of the assessment, which appear based on the assessment's/navigation form's data definition. Clicking the + icon will expand the nodes to reveal relationships or references on a selected object, while clicking the - icon will collapse the nodes. Deselecting a checkbox beside an object will remove it and the relationship and reference objects below it from the scope. Depending on your role's [permissions](#), clicking an object's monogram or name in the tree will display the object's form in a palette.
4. Saves the selection of objects and instances added to the scope and launches the assessment.
5. The assessment details, including its name and dimensions.

Scope & Launch/Create an Assessment

This article provides instructions for creating a new assessment then scoping and launching it immediately after creation. If the assessment was already created, it's possible to scope and launch it by opening it in a [view](#) , then following the instructions starting from step 6.

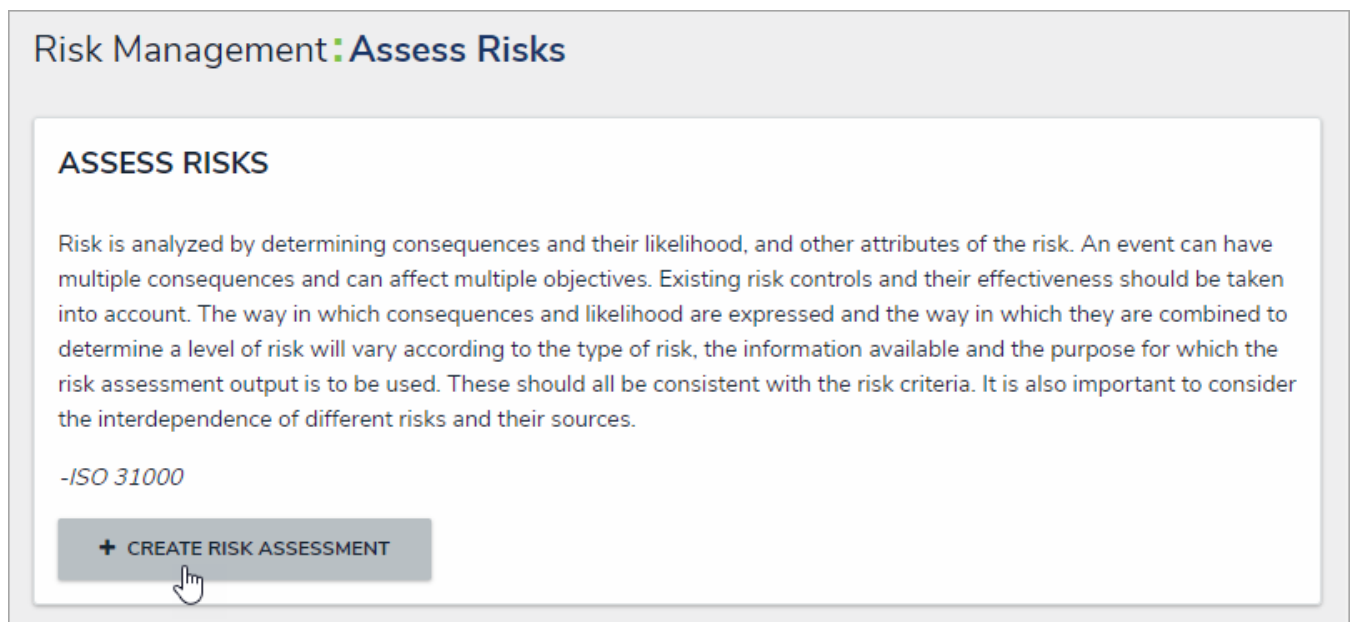
For more information on why assessments are scoped and launched, see the [Scope & Launch Overview](#) article. To learn more about the user interface of the scoping tool, see the [Scope & Launch User Interface](#) article.



The names of the forms, triggers, objects, etc. in the steps and screenshots below will vary depending on your organization's current configuration.

To scope and launch an assessment:

1. Navigate to the [application](#) and activity where the **Create Assessment** [action](#) is saved.
2. Click the action button to open the assessment form.



An assessment action. Clicking the button will open the assessment form.

3. Enter a name for the assessment in the **[Assessment] Name** field.
4. Complete one or all of the dimension fields.

Create Risk Assessment

Create a New Risk Assessment

Risk Assessment Name

Risk Assessment 36

Time ?

Q1



Business Unit ?

Search for a Business ...



CREATE

CANCEL

A form to create a new assessment.



The assessment dimension fields are marked as required, however, you are only required to complete **one** dimension field before you can create the assessment. Note, however, that any selections made in the dimension fields on this form cannot be undone once the assessment is saved.

5. Click the **Create** trigger to display the assessment review form.

Risk Assessment Review

Risk Assessment 36

Risk Assessment Name

Risk Assessment 36

Time

Q1

ADD PROCESSES AND RISKS

An assessment review form.

6. Click the [Open Assessment Scoping](#) action button (*Add Processes and Risks* in the screenshot above) to launch the scoping tool, which will display a list of [focus](#) objects that can be added to the assessment.
7. If needed, refine which objects are displayed by using one or more of the following default filters in the **Filters** pane to the left:
 - **Name:** Filters which objects are displayed based on their **Name** [property](#). When entering keywords in this field, press **Enter** on your keyboard to apply the filter.
 - **By Assessment Type:** Filters results by object type or assessment type. For example, in the screenshot below, selecting R&C Self Assessment in the **By Assessment Type** filter will only display objects with [instances](#) (assessment objects) that were created through the R&C Self Assessment type. Selecting the **Library** option in this filter will hide any instances. If no instances exist for the object, the **Assessments** section will be hidden automatically.
 - **By Dimension:** Filters which instances are displayed in the **Assessments** section by object type [dimension](#) . Once one or more options are selected in the **By Dimension** filter, additional filters are displayed to allow you to further narrow down the results. For example, in the screenshot below, selecting the Time Period and Business Unit object type dimensions displays additional filter options, where you can select specific objects (in this case 2018 - Q4 and Toronto). If no instances exist for the object, the **Assessments** section will be hidden.

Applying By Assessment Type and By Dimension filters to narrow down the results.

- **By Description/Unique ID:** Filters objects and instances by their **Description** and **Unique ID** properties .
- **By State:** Filters objects and instances by workflow state, including states from other [assessment workflows](#) .
- **Other:** Additional filters based on plain text fields, select lists, and multi-select lists added to the focus object type in the assessment. When entering keywords in a text field filter, press **Enter** on your keyboard to apply the filter.

8. To remove any unneeded filters, click the **X** beside the filter in the **Filters applied** section.

Removing unneeded filters in the Filters applied section.

9. **Add to Scope** beside an object to add it to the assessment.
10. To add an instance to the assessment, click the **Assessments** link below an object, then click **Add to Scope**. For more information about an instance, hover your cursor over the ellipsis beside the record.

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We do this by enabling them to manage both risk and security across the enterprise in a single solution. Our intuitive integrated risk management software for mid to large-sized or...

+ ADD TO SCOPE

ASSESSMENTS ^

...	R&C Self Assessment	2018 - Q4	TORONTO	ASSESSMENT	+ ADD TO SCOPE
...	R&C Self Assessment	2018 - Q2	TORONTO	ASSESSMENT	+ ADD TO SCOPE
...	R&C Self Assessment	2018 - Q4	EDMONTON	ASSESSMENT	+ ADD TO SCOPE
...	R&C Self Assessment	2018 - Q4	EDMONTON	ASSESSMENT	+ ADD TO SCOPE
...	R&C Self Assessment	2018 - Q2	EDMONTON	ASSESSMENT	+ ADD TO SCOPE

LOAD MORE

Clicking the Assessments link below an object will display any instances, which can then be added to the assessment.



If an object has not been previously assessed, it will not have any instances and the **Assessments** link will be hidden.

- Remove any unneeded objects or instances by clicking **Remove From Scope** beside that object or instance.
- Click the green banner at the bottom of the page to display the assessment [navigation form](#).

Q3 2018 Assessment: Toronto

2018 - Q1 - Time Period
Toronto - Business Unit

EDIT ASSESSMENT DETAILS

Add a Risk Category to your assessment from the list below. If it's necessary, you can add multiple Risk Categories to focus on. You'll be able to perform more granular scoping before you confirm the scope of your assessment.

Filters

By Name

By Assessment Type

By Dimension

By Description

By Unique ID

By state

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+

 ADD TO SCOPE

ASSESSMENTS

R&C Self Assessment
2018 - Q4
TORONTO

ASSESSMENT

— REMOVE FROM SCOPE

R&C Self Assessment
2018 - Q2
TORONTO

ASSESSMENT

— REMOVE FROM SCOPE

R&C Self Assessment
2018 - Q4
EDMONTON

ASSESSMENT

+ ADD TO SCOPE

R&C Self Assessment
2018 - Q4
EDMONTON

ASSESSMENT

+ ADD TO SCOPE

R&C Self Assessment
2018 - Q2
EDMONTON

ASSESSMENT

+ ADD TO SCOPE

LOAD MORE

←

Page 1 of 1 (1 to 1 of 1 items)

→

There are currently 30 objects added and ready for review

Clicking the green banner at the bottom of the page will display a navigation form where you can review and refine the objects and instances added to the scope.

13. Click the  icons in the tree to expand the nodes in the tree and display any [relationships](#) or [references](#) to the objects added to scope. The objects displayed in the tree are determined by the [data definition](#) selected by an administrator.
14. Click the names of the objects in the tree to review them in a palette. You may be able to edit the content in the form, depending on your role's [workflow permissions](#).
15. Deselect the checkboxes beside objects you wish to remove from the scope. By default, all objects and their relationships or references are selected (added to the scope). Deselecting an object in an upper node will automatically deselect the objects in the nodes immediately below it.

There are currently 12 objects added and ready for review ▼

FILTERS

REVIEW YOUR SCOPE

Take a look at the scope of your assessment by expanding the tree and seeing if you want to assess. To narrow the scope of your assessment, expand the nodes on the tree and then select or de-select specific items until you have exactly the data you want to assess selected.

Assessment details:
 Risk Assessment — Risk
 Assessment 36
 Q1 - Time

- [-] ☒ Retain High-Quality Employees ☒
- [-] ☒ Lack of social events ☒
 - ☒ Control 1 ☒
- [-] ☒ Not having Coffee in the morning A... ☐
 - ☐ Control 2 ☐
 - ☐ Control 3 ☐
 - ☐ Control 7 ☐
- [+] ☒ Not properly on boarding new empl... ☒

CONFIRM SCOPE

Reviewing your scope. De-selecting objects will remove them from the scope.



Instances cannot be deselected from the navigation form. To remove instances from the scope, click the green banner at the top of the page, then click **Remove From Scope** beside the instances in the **Assessments** sections.

16. To filter which objects are displayed in the tree, click the  icon, then select an object type in the **Select object type to filter tree with** dropdown menu to show the available plain text, select list, property filters available for that object type.
- To hide the filters, click the  icon.

FILTERS

Select object type to filter tree with

Process

By Name

Q

By Description

Q

By Unique ID

Q

By state

Q Select one...

By Narrative

Q

By Adequate Segregation of Duties?

Q Select one...

By Process Volatility

Q Select one...

By Susceptibility to Fraud

Q Select one...

By Number of Historical Findings

Q Select one...

By Complexity

Q Select one...

Available filters on the navigation form.

- Click **Confirm Scope**, then **Yes** to confirm and launch the assessment. If you created the assessment then accessed it later from a view, the form selected for that view will be displayed after clicking **Yes**. Otherwise, the form used to originally create the assessment will be displayed.

Data Definitions Overview

A **data definition** allows you to choose which object type(s) certain components draw their data from, including:

- [Assessments](#)
- [Reports](#)
- [Concatenations](#)
- [Orchestration event actions](#)
- [Navigation forms](#)

When creating a data definition, you must first select an **anchor** (root) object type, which is the starting point of your **data path**. Once an anchor is selected, the data path displays all the [relationships](#) and [references](#) associated with the anchor, so you can select the related object types you may want to include in an assessment or report. For reports, once your object type selections are saved in the data definition, you can further narrow down the data by creating new or using existing sub-data definitions, known as [data series](#) , then adding them to your report.



Because the structure of data definition resembles a tree, the anchor object type is also known as the root, the relationships and references on the anchor are the branches, and the object types within those relationships or references are the leaves on the branches.

Through the **Data Definitions** settings in **Administration**, you can create new data definitions as well as review existing definition by selecting the [By Anchor](#) tab or the [By Leaf](#) tab on the **Data Definitions** page.

By Anchor

When the **By Anchor** tab is selected, the data definitions are organized alphabetically first by the anchor (root) object type, **report focus eligible** definitions, then **data series** (sub-definitions). Clicking on a definition or data series will display the **Edit Data Definition** page where you can review the data path and edit the definition name and/or description.

Admin : Data Definitions

+ CREATE DATA DEFINITION

By Anchor

By Leaf

The Data Definitions are grouped by the root Object Type

L

LOCATION

DEFICIENCIES BY LOCATION

LOCATION DEFINITIONS

REPORT FOCUS ELIGIBLE

LOCATION ONLY

REPORT FOCUS ELIGIBLE

Risks & Controls

Time Spent (Hrs)

The Data Definitions page with the By Anchor tab selected. Employees Involved and Incidents by Location are the data definitions with Location as its anchor object type. Location & Person and Vehicles Involved in Incidents are data series (sub-definitions).

Data Series

Data series are sub-definitions that are populated based on the [leaf](#) or leaves in a data definition. Specifically, if a leaf object type has also been added as the anchor to another data definition, it will appear as a data series.

EXAMPLE

The Location Only data definition has the Location object type as its anchor, making it report focus eligible. Because the Location object type has been selected on two other data definitions in the org (Risks & Controls and Time Spent (Hrs)), those definitions appear as sub-definitions below Location Only. Clicking on one of those sub-definitions, in this case, Risks & Controls, will display its data path with the Location object type as its anchor.

Admin : Data Definitions

+ CREATE DATA DEFINITION

By Anchor

By Leaf

The Data Definitions are grouped by the root Object Type

L

LOCATION

DEFICIENCIES BY LOCATION

LOCATION DEFINITIONS

REPORT FOCUS ELIGIBLE

LOCATION ONLY

REPORT FOCUS ELIGIBLE

Risks & Controls

Time Spent (Hrs)

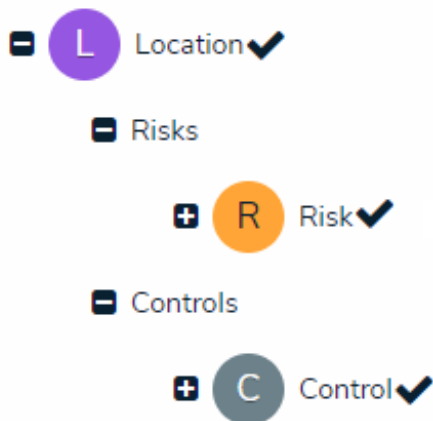
Clicking a sub-definition will display the Edit Data Definition page where you may edit its name and review the data path.

Admin : Edit Data Definition

RISKS & CONTROLS

DEFINITION

This is for reference only, and cannot be modified



The data path for the Risks & Controls sub-definition, which appears as a data series below the Location Only data definition.

Sub-definitions will also appear as separate reports below the anchor object when the [By Anchor](#) tab is selected. A data series definition may also [report focus eligible](#), depending on the data path.



Sub-definitions/data series are required when adding elements to [report](#), which allows you to further define which object type data is displayed.

By Leaf

When the **By Leaf** tab is selected, the data definitions are organized alphabetically by the last object type in the data definition. All definitions displayed in the By Leaf tab are [report focus eligible](#) . Clicking on a definition will display the **Edit Data Definition** page, where you can [edit](#) or [delete](#) the definition.

Admin : Data Definitions

+ CREATE DATA DEFINITION

By Anchor

By Leaf

The Data Definitions are grouped by the leaf Object Type, where all Data Definitions end on the same Object Type

L

LOCATION

Location Definitions

REPORT FOCUS ELIGIBLE

Location only

REPORT FOCUS ELIGIBLE

Definitions page with the By Leaf tab selected. The definitions are organized by the last object type in the data definition.

Report Focus Eligible Definitions

The data definitions labelled as **Report Focus Eligible** are definitions that can be selected when creating a new report and are used to broadly specify which object type's data will be displayed in the report.

A data definition cannot be report focus eligible if more than one unique object types on the same level has been selected. More specifically, when creating a report focus eligible definition, you can only select one unique leaf (object type) per each branch in the data path tree.

A definition can be report focus eligible with multiple selections on a leaf **only** if those selections are for the same object type.

Admin : Edit Data Definition

REPORT FOCUS ELIGIBLE

DEFINITION

This is for reference only, and cannot be modified

[-] ROT Root Object Type ✓

[-] Branch

[-] LOT Leaf Object Type 3 ✓

[-] Branch (Reference)

[+] ROT Root Object Type 2 ✓

A report focus eligible data definition. This data definition is eligible because only one leaf (object type) has been selected per each branch on the data path.

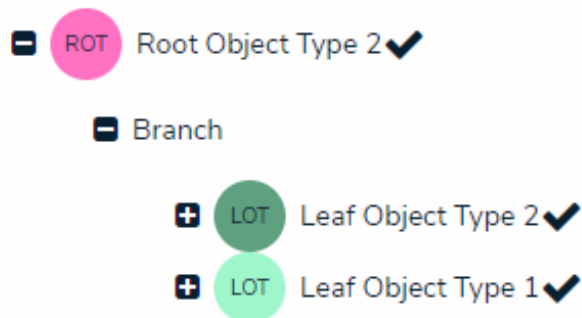
Admin : Edit Data Definition

NOT REPORT FOCUS ELIGIBLE



DEFINITION

This is for reference only, and cannot be modified



A data definition that is not report focus eligible because more than one leaf has been selected on a single branch in the data path.



A data definition will **not** be report focus eligible if more than one unique leaves have been selected per a single branch in the data path tree.

To view only report focus eligible reports, click the [By Leaf](#) tab.

Assessment Definitions

Unlike [report](#) data definitions, you can create [assessment](#) definitions from the **Edit Assessment** page (you can still edit their names and review the data paths from the **Data Definitions** page in **Administration**). Assessment definitions can be reused for reports and vice versa.

Create a New Data Definition

If you plan on creating a new [report](#) or [concatenation](#) , you can select one or more existing definitions, otherwise the definitions must be created **prior** to the creating the report or concatenation. If you're creating an [assessment](#), you can select existing definitions or create a new one from the **Edit Assessment** page.



Because the structure of data definition resembles a tree, the anchor object type is also known as the root, the relationships and references on the anchor are the branches, and the object types within those relationships or references are the leaves on the branches.

To create a new data definition:

1. Click the  icon in the top bar > **Data Definitions** in the **Data Model** section.
2. Click **Create Data Definition**.
3. Enter the name of the data definition in the **Name** field.
4. **Optional:** Enter a description of the data definition in the **Description** field, which will appear on the **Edit Data Definition** page and the **Add Data Definitions** palette on the **Edit Report** page.
5. Select an anchor (root) object type from the **Anchor** dropdown menu. Your selection here will determine the starting point, or root, of the data path.

Admin : Create Data Definition

Name

Employees on Incident Records

Description

Anchor

Incident

Select Data Paths

Clicking relationship and object type nodes below will define the paths that act as your data definition



CANCEL

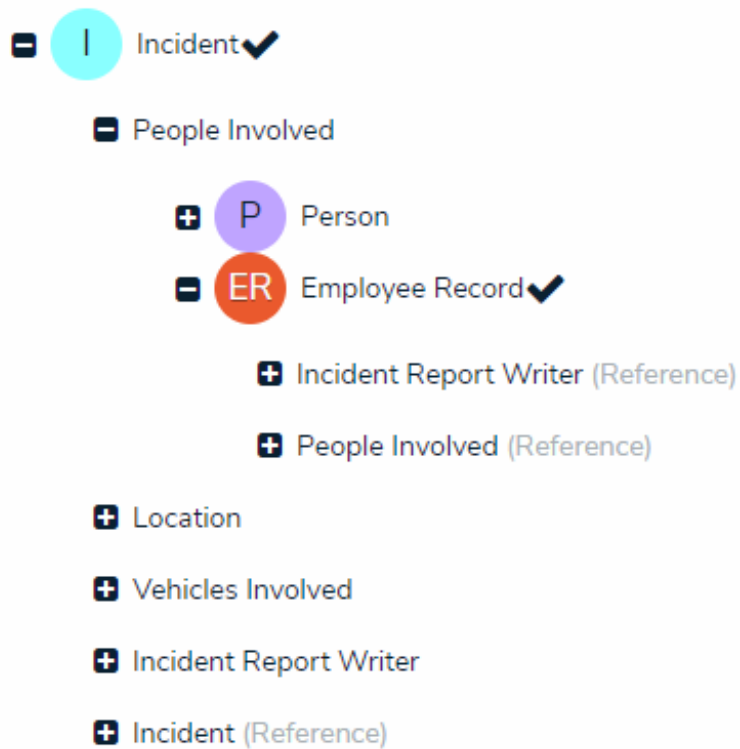
CREATE

A new data definition that has an anchor selected, but does not yet have a defined data path.

6. In the **Select Data Paths** section, click the monogram in the first node of the tree, which represents the anchor, to select it, expand the node, and reveal any relationships and references saved to the anchor. If you only need to select one object type, skip to step 10.
7. Click a relationship or reference (branch) to show the object type(s) within those relationships or references (e.g. clicking the “People Involved” relationship will reveal the Person and Employee Record object types).
8. Click an object type (leaf) monogram to place a checkmark next to it and include it in the data definition. To remove a checkmark and remove the leaf from the data path, click the monogram again. The anchor object type is selected by default and the cannot be deselected.
9. Continue clicking the branches to reveal the relationship and reference object types and select them as needed. If necessary, click an expanded branch with no leaves to collapse it.

Select Data Paths

Clicking relationship and object type nodes below will define the paths that act as your data definition



Selecting the object types that will be part of the data path.



If you intend to use this data definition as the focus of a report, you may only select one leaf per level (branch) in the data path. See [Report Focus Eligible Definitions](#) for more information.

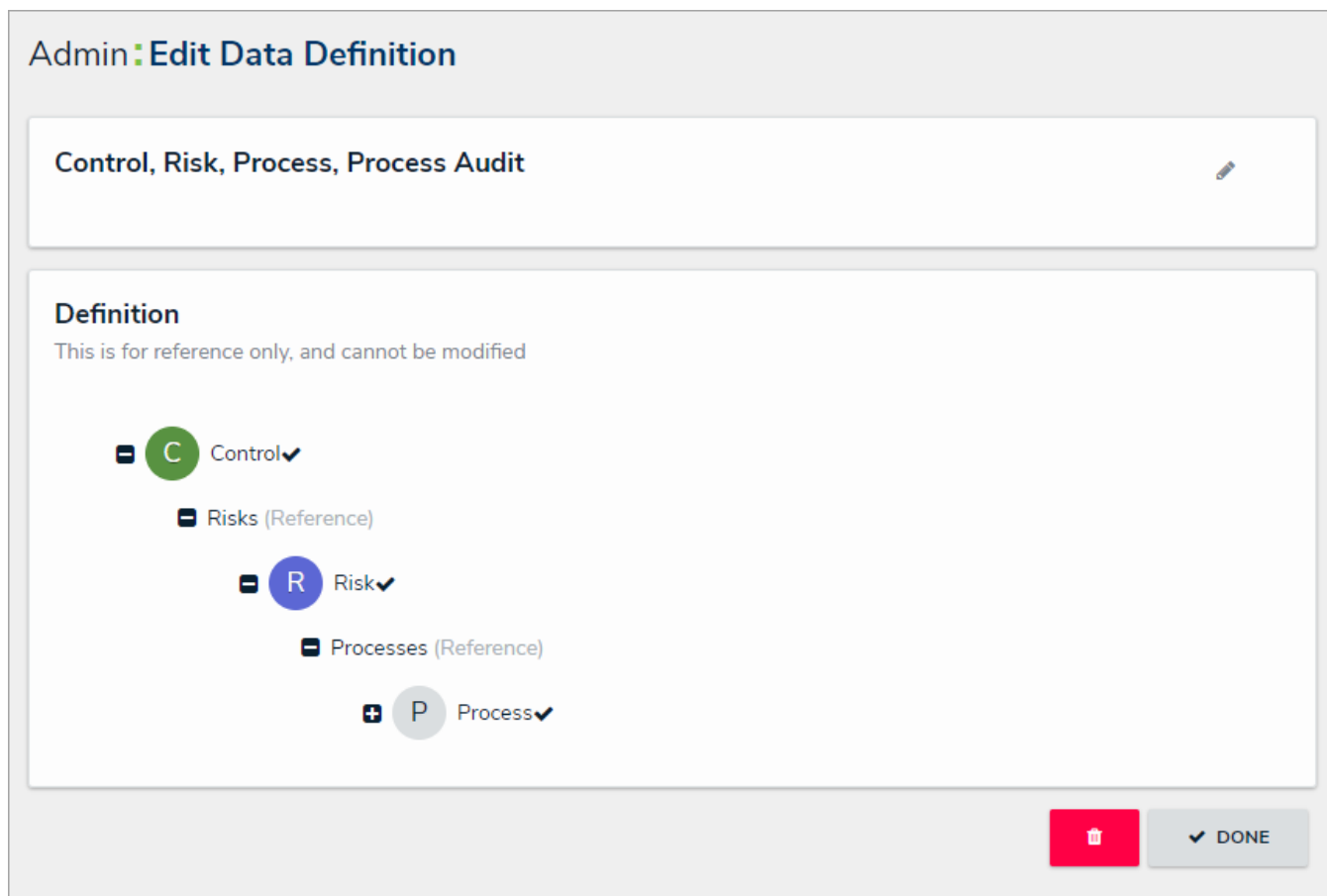
10. Click **Create** to display **Data Definitions** page. By default, this page will be displayed under the [By Anchor](#) tab and your new definition can be found below the anchor object type you selected in step 5 above (e.g. Incident). To view the data definition by leaf, or the last object type in the data path (e.g. Employee Record), click the [By Leaf](#) tab.

Edit or Delete a Data Definition

A data definition can be deleted, provided it's not currently being used elsewhere in Core. If you still wish to delete an active data definition, you can do so after removing it from or deleting the component(s) where it's being used (e.g. reports or assessments). You can edit the name and description of an existing data path at any time, however, **the data path cannot be modified**.

To edit or delete a data definition:

1. Click the  icon in the top bar > **Data Definitions** in the **Data Model** section.
2. Click an existing data definition to display the **Edit Data Definition** page.



The Edit Data Definition page.

3. To edit a definition's name and/or description, click the  icon on the **Edit Data Definition** page and make your changes in the **Name** and/or **Description** fields.
4. To delete the data definition, click the  icon, then click **Yes** to confirm. If the data definition is currently being used in another component, an error message will be displayed.

Configurable Forms Overview

Configurable forms are the forms that administrators create and customize for users to enter or view data while they work in Core. Form types include:

- **Standard Form:** Allows administrators to specify what form elements are displayed and the fields users should fill out on object types as they work in [activities](#) , [reports](#) , or [tasks](#) , depending on the current state of the object's [workflow](#) . For more information, see the [Standard Form Overview](#) article.
- **Navigation Form:** Uses a data definition to display objects as a hierarchical tree with expandable nodes, starting with the object from the anchor object type and moving down the data path. Clicking one of these objects will display a standard form or report to the right of the tree, without leaving the navigation form. For more information, see the [Navigation Form Overview](#) article.

Standard Forms Overview

A **standard form** is a configurable form type that allows administrators to specify what form elements are displayed and the fields users should fill out on object types as they work in [activities](#) , [reports](#) , or [tasks](#) , depending on the current state of the object's [workflow](#) . Whereas an object type's default form displays all the components and properties saved to it, with a standard form, you can add or remove the following [elements](#) and components:

- **Properties:** The object type's default fields, including **Name**, **Description**, **Unique ID**, **Monogram**, **Created/Modified By**, **Created/Modified On**, **Workflow Status**, and **Assessment Dimension**. The **Name** property should be added to all your forms as it's used to identify objects in search results, views, relationship fields/tables, etc.
- **Fields:** The fields saved to the object type as a component.
- **Relationships:** The relationships saved to the object type as a component. You can display the relationship as a field or as a table. If displayed as a table, you can select which columns appear on the object based on the fields saved to the object types in the relationship.
- **References:** The references created from the relationships saved to the object type.
- **State Triggers:** The triggers saved in the object type's workflow. When added, these triggers appear as buttons on the form that, once clicked, will move the form from its current state to another state, based on the trigger's transition.
- **Formulas:** The formulas saved on the object type as a component.
- **Roles:** The roles saved to an object type as a component that have explicit permission to view that object type. Adding roles allows you to grant certain users within that role the right to view the object.
- **Actions:** Places a button on the form that allows users to open a specified report or form related to the object type or export the object data into an Excel spreadsheet. If the form is for an assessment, you can also add a button to open an assessment scoping (nav form) to complete the assessment.
- **Other (Free Form Text):** An editable text box that will appear on the form to provide instructions, headings, titles, or additional information.
- **Assessment Context:** Adds the dimension fields onto forms for assessment object types.
- **Comments:** Allows users to leave comments on objects.

Once created, you can create [duplicate forms](#) , select a [priority](#) for forms that may be in conflict, and select which configurable form to display when creating and configuring an [action](#) , [view](#) , [report](#) , or [relationship table](#) . You can also select a configurable form to display by default when users within a role are viewing an object in a particular state by configuring the role's [workflow permissions](#) .

Admin

Edit Configurable Form

NEW INCIDENT

Object Type: Incident

FORM CANVAS

Object Name

Created On

January 1, 1970

Created By

John Smith

Incident Details

People Involved

Vehicles Involved

Items Involved

Incident Name

Date & Time the Incident Occurred

FORM ELEMENTS

Properties

Fields

Additional Information Required

Address

Blue Book Value

Comments

Control Effectiveness

Date of Additional Review

Date of Initial Review

Date of submission

Date & Time the Incident Occurred

Date Updated

Document Request List

The Edit Configurable Form page.

Create Incident

Create a New Incident

Created On

2017-09-15

Created By

Incident Details

People Involved

Vehicles Involved

Items Involved

Incident Name 

Date & Time the Incident Occurred

Incident Type

Incident Severity

SAVE AS DRAFT

SUBMIT FOR REVIEW

A configurable form as it appears in a view.



Fields, relationships, references, formulas, and roles must be added to the object type as **components** and state triggers must be added to the **workflow** before they can be added to a configurable form.



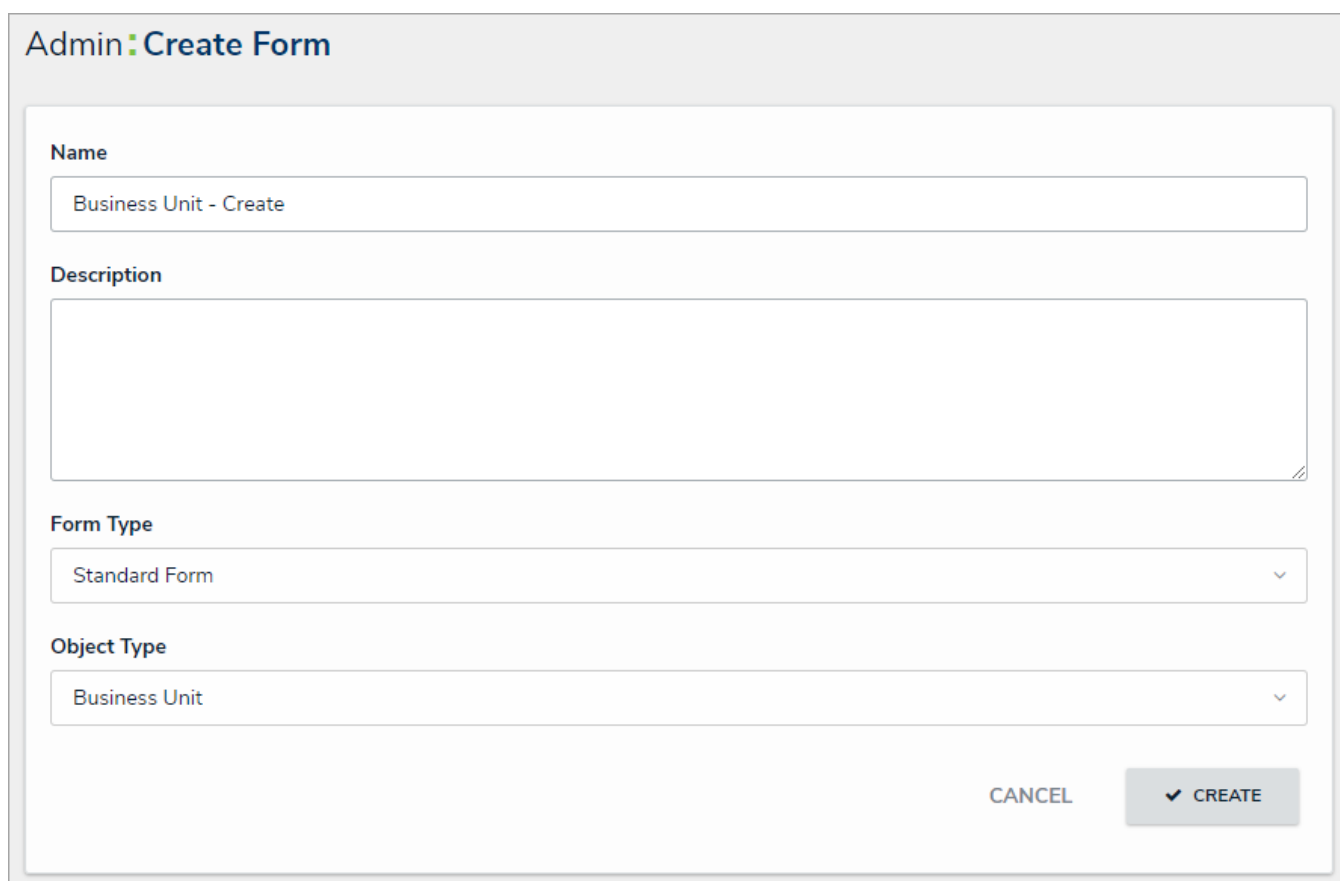
You can check which forms are associated with an object type by going to **Administration > Object Types** clicking the object type to open the **Edit Object Type** page, then reviewing and/or clicking on the forms in the **Related Forms** section in the **Overview** tab.

Create a New Standard Form

Once a standard form is created, you can configure its [title](#) , set the form's [priority](#) , create [sections](#), and add [elements](#) .

To create a new standard form:

1. Click the  icon in the top bar >**Configurable Forms** in the **Views** section.
2. Click **Create Configurable Form**.
3. Enter the name of the form in the **Name** field.
4. **Optional:** Enter a brief description of the form in the **Description** field, which will appear below the form's name while editing the form and on the **Configurable Forms** landing page.
5. Select **Standard Form** from the **Form Type** dropdown menu. See the [Navigation Forms](#) section for information and instructions on creating navigation forms.
6. Select an object type from the **Object Type** dropdown menu.



The Create Form page.

7. Click **Create** to display the **Edit Configurable Form** page. From here, you can edit the standard form's [title](#) , [select a priority](#) , and add [sections](#) and [elements](#) .

Admin: Edit Configurable Form

Business Unit - Create

Object Type: Business Unit

Form Canvas

Object Name

Drag and Drop Elements or Sections

FORM ELEMENTS

Properties

Fields

Relationships

References

State Triggers

The Edit Configurable Form page with a blank canvas.

Form Conflict Overview

If a user belongs to two or more [roles](#) that have permission to view the same object, but each role should be accessing that object through a different [standard form](#), a **form conflict** exists. By default, Core will display the most recently created form to the user; however, you can identify forms that are potentially in conflict by impersonating the user, navigating to one of the forms, then assigning priorities to the forms to control which one should be displayed first.

EXAMPLE

Caroline is a user added to the Risk Owner and Control Owner roles, both of which have permission to access the Control object type. You create two forms for the Control object type: the Control Owner form for the Control Owner role, which is completely editable, and the Risk Owner form for the Risk Owner role, which is read-only except for a few fields. As the control owner for Control 1, Caroline needs to access this object and make changes; however, because the Risk Owner form was created after the Control Owner form, the Risk Owner form is displayed, preventing her from making the required changes. To remedy this, you edit both forms to assign the Control Owner form a 2 priority and Risk Owner a 1 priority. With these forms prioritized, the next time Caroline needs to edit a control object she owns, she'll be able to make all the changes as needed.

For information on checking for form conflicts and assigning form priorities, see the [Identify a Conflict & Set a Form's Priority](#) article.

Identify a Conflict & Set a Form's Priority

When a user belongs to two or more [roles](#) that have permission to view the same object, Core automatically displays the most recently created standard form to that user, which may result in a [form conflict](#). To resolve this, administrators can use the [impersonation](#) feature to identify any conflicts, then assign number priorities to the forms to ensure the correct form is displayed.



By default, all forms are assigned a 0 priority. If no form conflict exists, the forms will be displayed based on the administrative configurations.

To identify a conflict and set a form's priority:

1. Assign the user you'll impersonate to an object by:
 - Adding the user via the [role element](#) on a form, then creating a [view](#) using the object type's default form; or
 - Assigning the user via the [Assign permission](#) on the role, ensuring the **Default** option is selected for the appropriate state in the **Select a default form for this state for this role** dropdown menu in the role's workflow permissions. This method should be selected if you'll be using the [search](#) function to locate the object once **Impersonation Mode** is activated.

The screenshot shows a user interface for assigning permissions. At the top left, there's a blue circle icon and the text 'Not Started'. To the right are four blue buttons: 'READ', 'EDIT', 'DELETE', and 'MANAGE'. Below these is a 'Triggers' section with a lightning bolt icon, a 'START' button, and an 'ASSIGN' button. At the bottom, there's a dropdown menu titled 'Select a default form for this state for this role' with 'Default' selected.

The Assign option for a role's workflow permissions with the Default option selected.

2. Click the  icon in the top bar > **Users** in the **People** section.
3. Click **Impersonate** beside the name of the user to turn on **Impersonation Mode**. See the [Impersonate Another User](#) article for more information on using this feature.
4. Navigate to the object according to the assignment method in step 1. If a conflict exists, a blue banner will be displayed.

TURN OFF IMPERSONATION MODE Impersonation mode: On Impersonating: Caroline Sorensen

RESOLVER (+) (Q) (ooo) (?) (u)

Risk Management Identify Risks Assess & Treat Monitor & Review ...

Uh oh, this form is in conflict. Adjust the priority in the configurable form builder ...

Create Risk

Create a New Risk

Risk Name

Description

Processes Risk Sub Category

Search + Search +

Viewing a form that's in conflict while in Impersonation Mode.

- Click the ellipsis in the blue banner to display the forms in conflict.

Risk Management Identify Risks Assess & Treat Monitor & Review Issues & Actions ...

Uh oh, this form is in conflict. Adjust the priority in the configurable form builder ...

Create Risk

Create a New Risk

Risk Name

Conflicting Forms:

Risk - Create Risk Detailed (this form)	Priority: none
Risk - Create	Priority: none

Clicking the ellipsis in the blue banner will display all the forms that are currently in conflict for the impersonated user.

- Click a form to display the **Edit Configurable Form** page, which will disable **Impersonation Mode**.
- Click the  icon at the top of the page to display the **Name**, **Description**, and **Priority** fields.
- Enter a number in the **Priority** field, noting that:
 - This field accepts up to nine numeric characters, with a range of -999999999 to 999999999.
 - The higher the number entered, the higher the form's priority, with negative numbers being lower (e.g. -1 is a lower priority than 0). For example, if you assign one conflicting form a 1 priority and the other conflicting form a 2 priority, the form with a 2 priority would be displayed before the form with a 1 priority.
 - By default, all forms are assigned a 0 (none) priority.

Admin : Edit Configurable Form

Risk - Create

Name

Risk - Create

Description

Priority

1

Where does this form rank in relation to other forms for this object type if multiple forms conflict (1 being lowest)?

Assigning a priority to form to remove any form conflicts.

9. **Optional:** Repeat the steps above to assign other conflicting forms a priority. Note that if the form you wish to display to the user has been assigned a higher priority than all other conflicting forms, it's not necessary to assign lower priorities to those forms.

Entering **Impersonation Mode** for the user after assigning a priority will still display the blue banner to indicate that a potential form conflict exists. However, clicking the ellipsis will display the priorities assigned to the conflicting forms and allow you to edit them as needed.

Uh oh, this form is in conflict. Adjust the priority in the configurable form builder ...

Conflicting Forms:

Risk - Create Risk Detailed (this form)	Priority: 1
Risk - Create	Priority: none

Clicking the ellipsis in the blue banner will display the forms' priorities, if any.

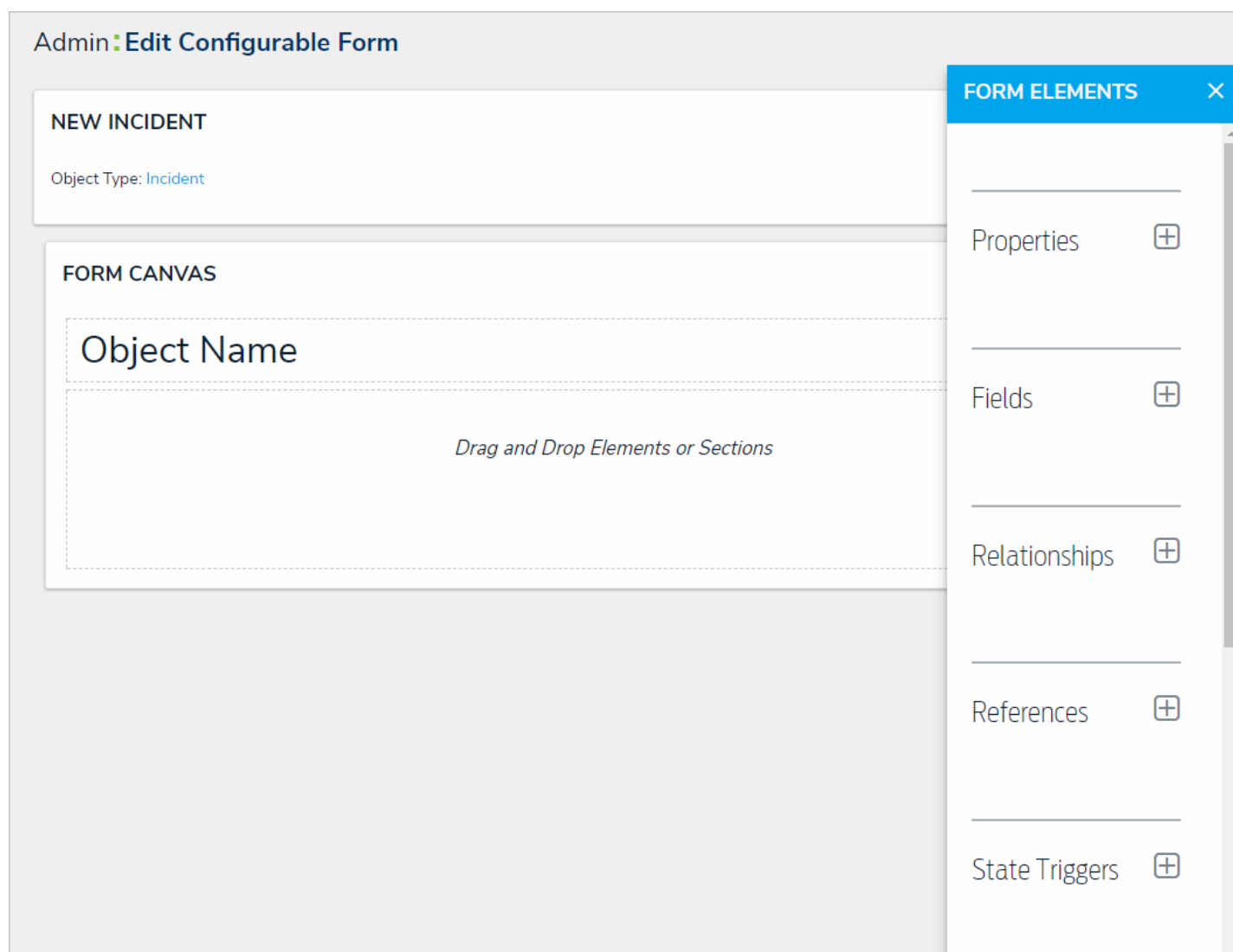
Add Elements to a Standard Form

Elements (e.g. fields, relationships, formulas, etc.) can be added to a standard form by dragging and dropping them from the **Form Elements** palette and onto a section. You can open and close the palette by clicking the  icon in the top-right section of the form canvas.

If needed, you can mark added elements as read-only to users viewing the form by hovering your cursor over the element in the canvas, then clicking **Mark Read-Only**. To make an element editable again, hover your cursor over the element and click **Remove Read-Only**.



In order to add fields, relationships, references, formulas, and/or roles to a form, they must first be added to the object type as components. See the [Object Types](#) section for more information.



A blank standard form. The Form Elements palette to the right of the canvas is opened automatically, but you can open and close it by clicking the icon at the top right of the Form Canvas section. Elements can be added by expanding the arrow icon next to the element then dragging and dropping it onto a section.

FORM CANVAS

Comments



Drag and Drop Elements or Sections

+ SECTION

Dragging and dropping an element onto the form canvas.



Elements that have already been added to the canvas will appear in **Form Elements** section with green to the left of their names.

Properties on Forms

The **Properties** section of the **Form Elements** allows you to add and display an object's default information, including:

- **Name:** The title of the object, which helps identify the object in [views](#) or [search](#) results. The header of this property appears on forms as [Object Type] Name (e.g. Incident Name).



The **Name** property should be included on all your standard forms as it's used to identify objects in search results, views, reports, relationships, etc. If this property is not added to your forms, users will not be able to search for and select existing objects in relationship fields or tables.

- **Description:** A description of the object.
- **Unique ID:** The unique identifier automatically assigned to the object type at the time of creation.
- **Monogram:** The letter(s) and color assigned to the object type.
- **Created By:** The user who created the object.
- **Created On:** The date the object was created.
- **Modified By:** The name of the user who last modified the object.
- **Modified On:** The date the object was last modified.
- **Workflow Status:** The current state of the object.
- **Assessment Dimension:** Adds read-only [dimension](#) data onto the form of objects that were referenced on an assessment. If an object has not been referenced on an assessment, the property will be invisible.

Fields on Forms

You can add any fields that were previously saved to the object type as components to standard forms. See the [Add Fields to an Object Type](#) section for more information on adding fields as components on object types.

Clicking the  icon in the top-right corner of the field will open the **Edit Component Display** window, where you can display the field's short name or long name. If the object type is used in assessments, you can also choose to display an assessment table. See [Enable an Assessment Table](#) for more information.



If **required fields** have been added to a **state**, you must ensure these fields have been added to any applicable standard forms, otherwise users will not be able to view and complete the required fields to transition the object to the next state.

Enable an Assessment Table

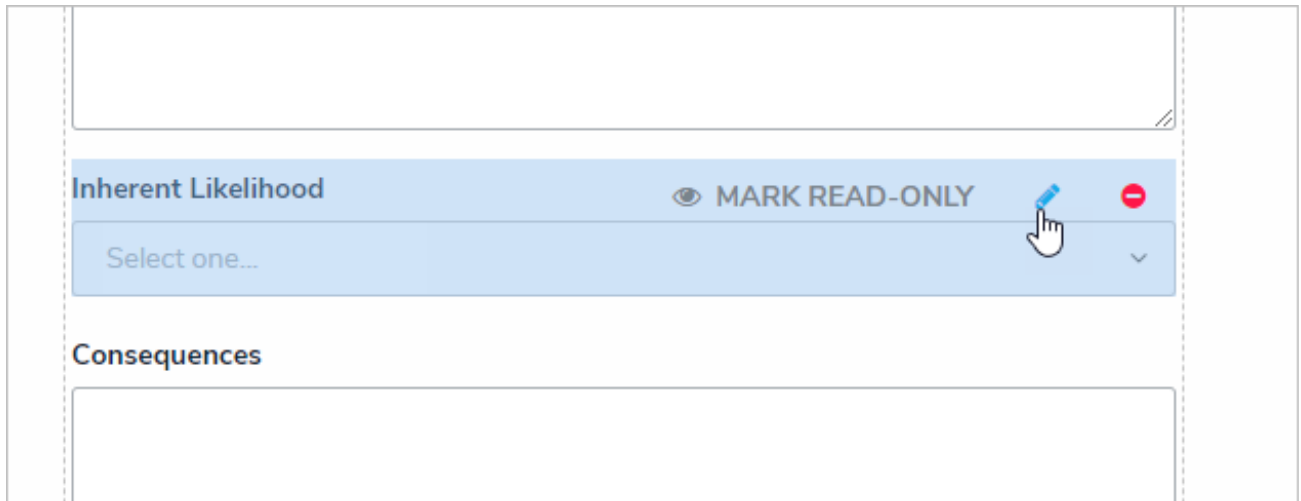
An **assessment table** displays previous assessment data in a table on a standard form. The data in the table is pulled from the five most recently modified instances of the object currently displayed on the form, helping users better understand how data has changed over time and across different assessments.

This table is enabled in the settings for a plain text, numeric, select list, formula, or date and time [field element](#) on a standard form. To define what data is displayed in the form, administrators select data from the object type and assessments (properties, fields, dimensions, raw data [the numeric data of a select list] and trending data).

Users can click on data in this table to display the instance form in a palette, using either its default form or a form selected in the [workflow permissions](#) for the object type. Up to five instances will appear on the table. If a user doesn't have permission to view the instances, they will not appear in the table.

For example, with the assessment table enabled on a Risk object type form, opening that form for Risk 3 (R-3) will display the name and business units from the assessments where the instances were created. Clicking data in a cell will open the related instance in a palette (e.g. R-3.1, R-18, etc.), allowing you to review how that risk is being assessed across the organization.

3. Hover your cursor over the field, then click the  icon to display the **Edit Component Display** screen.



Hovering the cursor over a field on the form canvas to display the field options.

4. Click the  icon beside **Enable Assessment Table**.
5. Select one of the following options from the dropdown menu to determine what will be displayed in the data:
- **Raw Value:** The numeric value (with no label) of a select list field on which the table has been enabled (e.g. displaying the data from the "Control self-assessment" field, from which the table was enabled).
 - **Trending:** Displays up or down arrows on the form to indicate whether the field added to the table is in an upwards (higher numeric value) or downwards (lower numeric value) trend. To display trending data in this option, the other field selected in the table must contain numeric data (e.g. select lists, formulas, or numeric fields).
 - **Assessment Name:** The name of the assessment from which the instance(s) were created.
 - **Properties:** The properties of the assessment (e.g. Name, Unique ID, Description, etc.).
 - **Fields:** Any fields added to the object type or assessment.
 - **Dimensions:** The [dimensions](#) of the assessment where the instance(s) were created.
6. Click **Add Selected** to add the option to the table.
7. Continue adding options as needed.

Assessment table

☒ Enable Assessment Table

Select one...

▼

+ ADD SELECTED (0)

Assessment Name	×
Business Unit	×

CLOSE

Options added to the assessment table.

- Click **Close** to return to the form canvas.

Relationships on Forms

Once a relationships can be displayed on standard forms as dropdown menus or tables, where end users can search for and/or create new objects through that relationship. Before the relationship element can be added to a form, it must be added to the object type as a component. See [Add Relationships to an Object Type](#) for more information.

By default, relationships are added to the form canvas as a dropdown menu, displaying its name (versus the long name), but you can configure the element to choose how the relationship is displayed, which functionality is available, and which form is displayed when creating a new object.

Controls

Control 1

×

▼

+

Issues

Name	Workflow State	
Issue 3	Draft	×
Issue 1	Open	×

Start typing to find an ...

▼

+

Relationships on a form displayed as both a dropdown menu and a table.

Administrators can also select the **Enable Advanced** option when configuring relationships on a form. This option will open a palette with advanced search options for users to select existing objects and assessment objects, if any, to add to the relationship.

ADD EXISTING CONTROLS

Q Start typing to find an existing Control

Showing 2 most recently created Control

If you don't see what you were searching for, try searching from all Controls above.

C-2

Formal customer feedback process

DRAFT

ADDED

ASSESSMENTS ^

...

R&C Self Assessment

2018 - Q2

TORONTO

+ ADD

...

R&C Self Assessment

2018 - Q2

TORONTO

+ ADD

...

R&C Self Assessment

2018 - Q2

TORONTO

+ ADD

...

R&C Self Assessment

2018 - Q2

TORONTO

+ ADD

...

R&C Self Assessment

2018 - Q4

TORONTO

+ ADD

LOAD MORE

C-1

Customer evaluation assessments

DRAFT

ADDED

ASSESSMENTS v

Enabling the advanced option displays a palette for users adding existing objects to a relationship.

The standard search function and page numbers are disabled on relationship tables that display 4 objects or fewer.

To configure a relationship on a standard form:

1. If needed, open the form you wish to add the relationship element to by clicking the  icon in the top bar > **Configurable Forms** in the **Views** section, then selecting a form.
2. After **adding** the relationship element to your form, hover your cursor over the relationship on the canvas, then click the  icon to open the **Edit Component Display** screen.

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Edit Component Display

Header display

☒ Display 'Name'
 ☐ Display 'Long Name'

Format

☒ Enable Search
 ☒ Enable Create
 ☒ Enable Advanced This improves the search interface, as well as displaying Assessment History

View Relationship as:

☒ Dropdown
 ☐ Table

Object Type Forms

The relationship element settings.

- Click **Display 'Long Name'** if you want to display the relationship's long name on the form. To add or edit a long name, open the **Edit Object Type** page where the relationship has been added as a component, click the **Relationships** tab, then click the relationship to open the **Edit Relationship** palette.

- Click the  icon beside **Enable Search** if you want to disable the end user's ability to search for existing objects in the relationship.

- Click the  icon beside **Enable Create** if you want to disable the end user's ability to create new objects through the relationship.



Disabling both **Search** and **Create** functionality on a relationship will make the element read-only.

- Click the  icon beside **Enable Advanced** to display the advanced user interface for the relationship on a form.

When this option is enabled, clicking **Add Existing [Object]** will open a palette that allows users to search for and select one or more objects or assessment objects (if any) to add to the relationship.

Controls

Unique ID	Name	Design Effectiveness	Operating Effectiveness	Workflow State	
C-6	Control 1	Not Effective	Effective	Draft	✕

Start typing to find an ...

+

Issues

Name	Workflow State	
Issue 3	Draft	✕
Issue 1	Open	✕

ADD EXISTING ISSUES

+ CREATE NEW

The highlighted reference table demonstrating how the advanced display appears on a form, whereas the reference above it is displaying the default interface.

- To display the relationship as a dropdown menu, leave **Dropdown** selected under **View Relationship as:** (selected by default).
- To display the relationship as a table, select **Table** under **View Relationship as;** then click to select the properties and fields from the object type(s) in the relationship that you want to include on the table as columns.

Build the Relationship Table

Select the Properties and Fields to include as columns.

☒	Name	
☒	Description	
☒	Unique ID	
	Monogram	
☒	Created By	
☒	Created On	
	Modified By	
	Modified On	
☒	Workflow State	
	External Reference Id	
	DOB	FIELD EMPLOYEE RECORD PERSON
	Address	FIELD EMPLOYEE RECORD PERSON
	Phone Number	FIELD EMPLOYEE RECORD
	E-mail	FIELD EMPLOYEE RECORD

Selecting the properties and fields that will appear on the relationship table as columns.



The columns will appear on the table in the order they were selected in the **Build the Relationship Table** settings.

9. For both the dropdown and table options, below **Object Type Forms**, select the form(s) the users will complete if they're creating new objects through the relationship.

Object Type Forms

Select creation form to use for each Object Type.

Employee Record

Employee Record

Person

People

Selecting the configurable form that will be displayed when an end user creates a new object through a relationship.



If no configurable form(s) have been created for the object type(s) in the relationship, the default form(s) will be selected automatically.

10. Click **Close** when finished.

References on Forms

The **References** standard form element indicates that the current object has been referenced on other objects through a [relationship](#). Administrators can configure this element to display those other objects as dropdown menus or tables, through which end users can search for and/or create new objects. Before the reference element can be added to a form, the form's object type must be added to a relationship on another object type. See [Add References to an Object Type](#) for more information.

The data available in the References element belongs to the object type(s) where the relationship was originally saved. For example, if the Vehicle object type is saved in a relationship on the Incident object type, the data displayed on the form will be from Incident.

By default, references are added to the form canvas as a dropdown menu, displaying its name (versus the original relationship's long name), but you can configure the element to choose how the reference is displayed, which functionality is available, and which form is displayed when creating a new object.

Assets

Name	Unique ID	Created On	Workflow State	
Asset 3	A-6	2018-02-05	Default	✕
Asset 1	A-1	2017-11-20	Default	✕

Start typing to find an ...

▼

+

Processes

Retain High-Quality Employees✕

▼

+

References on a form displayed as both a table and dropdown menu.

Administrators can also select the **Enable Advanced** option when configuring references on a form. This option will open a palette with advanced search options for users to select existing objects and assessment objects, if any, to add to the reference.

ADD EXISTING CONTROLS

Q Start typing to find an existing Control

Showing 2 most recently created Control

If you don't see what you were searching for, try searching from all Controls above.

C-2

Formal customer feedback process

DRAFT

ADDED

ASSESSMENTS ^

... R&C Self Assessment2018 - Q2TORONTO+ ADD

... R&C Self Assessment2018 - Q2TORONTO+ ADD

... R&C Self Assessment2018 - Q2TORONTO+ ADD

... R&C Self Assessment2018 - Q2TORONTO+ ADD

... R&C Self Assessment2018 - Q4TORONTO+ ADD

LOAD MORE

C-1

Customer evaluation assessments

DRAFT

ADDED

ASSESSMENTS v

Enabling the advanced option displays a palette for users adding existing objects to a relationship.

To configure a reference on a standard form:

1. If needed, open the form you wish to add the reference element to by clicking the  icon in the top bar > **Configurable Forms** in the **Views** section, then selecting a form.

2. After **adding** the reference element to your form, hover your cursor over the reference on the canvas, then click the  icon to open the **Edit Component Display** screen.

×

Edit Component Display

Header display

☒ Display 'Name'
 ☐ Display 'Long Name'

Format

☒ Enable Search
 ☒ Enable Create
 ☒ Enable Advanced This improves the search interface, as well as displaying Assessment History

View Relationship as:

☒ Dropdown
 ☐ Table

Object Type Forms

The reference element settings.

- Click **Display 'Long Name'** if you want to display the long name of the originating [relationship](#) on the form. To add or edit the relationship's long name, open the **Edit Object Type** page where the original relationship was created, click the **Relationships** tab, then click the relationship to open the **Edit Relationship** palette.

- Click the  icon beside **Enable Search** if you want to disable the end user's ability to search for existing objects in the reference.

- Click the  icon beside **Enable Create** if you want to disable the end user's ability to create new objects through the reference.



Disabling both **Search** and **Create** functionality on a reference will make the element read-only.

- Click the  icon beside **Enable Advanced** to display the advanced user interface for the relationship on a form. When this option is enabled, clicking **Add Existing [Object]** will open a palette that allows users to search for and select

one or more objects or assessment objects (if any) to add to the reference.

Controls

Unique ID	Name	Design Effectiveness	Operating Effectiveness	Workflow State	
C-6	Control 1	Not Effective	Effective	Draft	✕

Start typing to find an ...

▼

+

Issues

Name	Workflow State	
Issue 3	Draft	✕
Issue 1	Open	✕

🔍 ADD EXISTING ISSUES

+ CREATE NEW

The highlighted reference table demonstrating how the advanced display appears on a form, whereas the reference above it is displaying the default interface.

7. To display the reference as a dropdown menu, leave **Dropdown** selected under **View Relationship as:** (this option is selected by default).
8. To display the reference as a table, select **Table** under **View Relationship as:**, then click to select the properties and fields from the reference object type that you want to include on the table as columns (e.g. if the Vehicle object type is referenced in a relationship on the Incident object type, you can display properties and fields from Incident in the table).

Build the Relationship Table

Select the Properties and Fields to include as columns.

☒	Name	
☒	Description	
☒	Unique ID	
	Monogram	
☒	Created By	
☒	Created On	
	Modified By	
	Modified On	
☒	Workflow State	
	External Reference Id	
	DOB	FIELD EMPLOYEE RECORD PERSON
	Address	FIELD EMPLOYEE RECORD PERSON
	Phone Number	FIELD EMPLOYEE RECORD
	E-mail	FIELD EMPLOYEE RECORD

Selecting the properties and fields that will appear on the relationship table as columns.



The columns will appear on the table in the order they were selected in the **Build the Relationship Table** settings.

9. For both the dropdown and table options, below **Object Type Forms**, select the form the users will complete if they're creating a new object through the reference.

Object Type Forms

Select creation form to use for each Object Type.

Incident

Selecting the configurable form that will be displayed when an end user creates a new object through the reference.



If no configurable form(s) have been created for the object type(s) in the relationship, the default form(s) will be selected automatically.

10. Click **Close** when finished.

State Triggers on Forms

Adding [triggers](#) to a standard form will place a button on the form that a user can click to move the object from one state to another. Triggers are configured in an object type's workflow. See the [Workflows](#) section for more information on configuring an object type's state, triggers, and transitions.

Create Incident

First Name

Last Name

Contact Information

SAVE AS DRAFT

SUBMIT FOR REVIEW

CANCEL

Two triggers on a standard form.



Because triggers must be associated with a state, you can add multiple triggers to a standard form, but a trigger will appear only when the object is in the state associated with the trigger. For example, users won't see the

Request Additional Info trigger on the form while an object is in the Draft state because the trigger is related to the In Review state.



At a minimum, you must add a trigger associated with Creation state to a standard form so users can save the object by transitioning it out of the entry state.

Formulas on Forms

Formulas are components that compile numeric data from variables to generate conclusions, such as Incident Severity, Estimated Damage, or Likelihood the Incident Will Recur. These conclusions can be on forms as a number, label (e.g. Low, Medium, High), both numbers and labels, or as a gauge all with optional colors.

To display the formula as a gauge on a standard form, click **Show As Gauge** once the **Formula** element has been added to the canvas.

Before a formula can be added to a form, it must be added to an object type as a component. See the [Add Formulas to an Object Type](#) section for more information For more general information on formulas and how they work, see the [Formulas](#) chapter.

Vehicles Involved

Blue Car

×

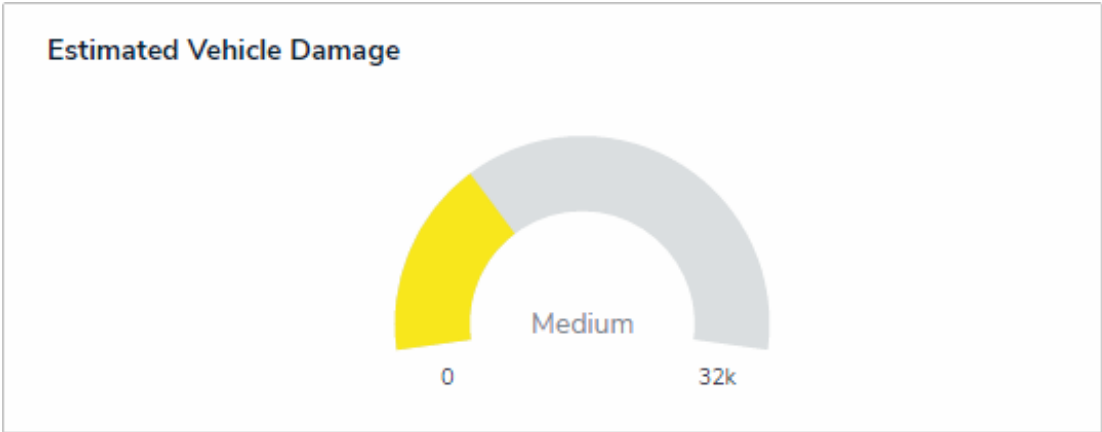
▼

+

Estimated Vehicle Damage

Medium

A formula on an object.



A formula displayed as a gauge on an object.

Roles on Forms

Roles control the data a user can create, edit, delete, view, or manage on object types and are added to object types as components. See the [Add Roles to an Object Type](#) section for more information on adding roles to object types.

Adding a role with explicit permissions to a standard form allows you to grant a user within that role permission to view specific objects, along with any other objects authorized through [inferred permissions](#) . Access to the object type is granted by adding the individual users, [user groups](#) , or specific users within a user group, to the role field on the form. Only users or user groups who have been added to the role may be selected in this field.

Users in the role can't see the object until they've been specifically selected in the role's field on the form nor can they access the object until it's in a state they're authorized to view. What the user can do with the object, including any objects accessed through inferred permissions, is controlled by the object type's [workflow permissions](#) for the selected role.



As users with global permissions can automatically view all the objects that belong to the object type(s) added to their role (subject to any workflow permissions), you can only add roles with explicit permissions to an object type.

EXAMPLE

Recently, an incident occurred on-site that involved violence between two employees. The Incident object, SB/Violence 2016/11/23 was created by another employee, then submitted to Kevin Darden, who is in the Incident Reviewer role with global permissions on the Incident object type. Upon reviewing the object, Kevin decides that it needs to be escalated to the Director of Human Resources, Kathleen Leighton, who will decide if an investigation is required. Because Kathleen only needs to see incidents that have been escalated, her role, HR Director, has explicit permissions to view Incident objects. Therefore, to grant Kathleen access to see this object, Kevin adds her to the HR Director role on SB/Violence 2016/11/23, so she can see and edit the object and decide if the incident requires an investigation.

HR Director

Kathleen Leighton

x

▼

A user granted access to an object through an added role on a configurable form.

Form Actions Overview

The **Actions** element allows end users to open a specified form or report (including [Data Analytics Export reports](#)) by clicking a button on a standard form.

This element type is useful when the user needs to complete or print related forms throughout a process, they would benefit from being able to view report data while working in an object, or they need a summary of object data for further analysis.

Form actions include:

- **Open a report/form:** Opens a report or standard form related to the object type.
- **Export Data:** Opens a [report](#) that allows users to export object data from the form's object type.
- **Open Assessment Scoping:** Opens a [navigation form](#) that allows users to view, filter, and add focus objects to an assessment.

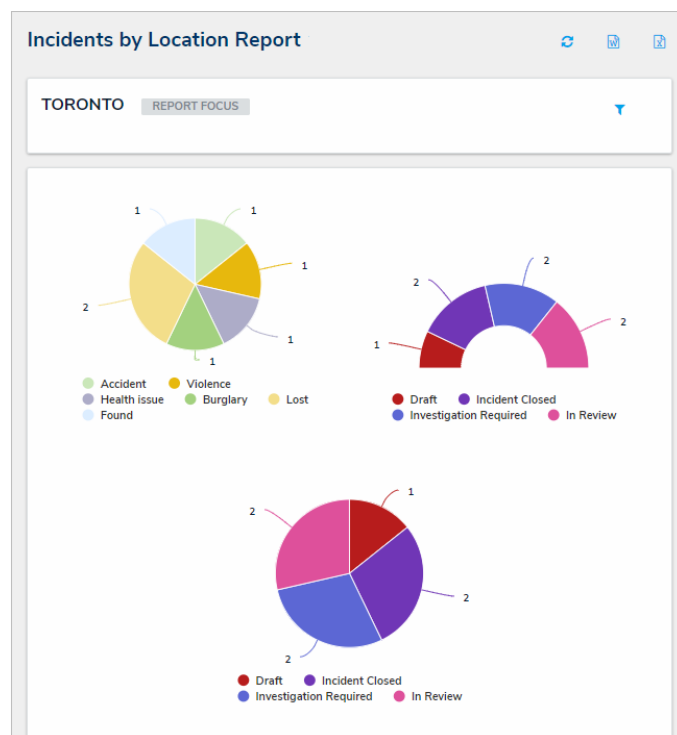
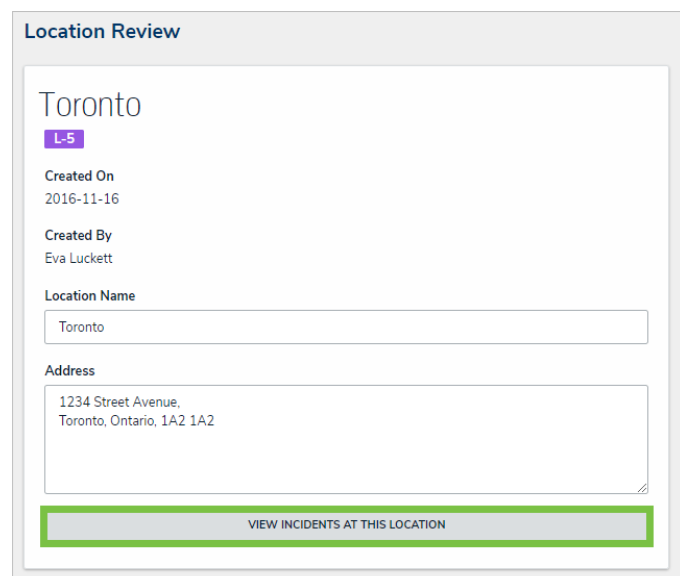
Because each form action requires data from the originating object, actions should only be added to forms for **existing** objects. Clicking an action button on a form still in the **Creation** state will display blank, read-only forms or reports with no data. If the **Open Assessment Scoping** action is added to a standard form for a new assessment, it will not be displayed until the assessment has been created.

The screenshot displays the 'FORM CANVAS' interface on the left and the 'FORM ELEMENTS' panel on the right. The canvas contains a form with the following elements: a text input for 'Object Name', a text input for 'Assessment Name', a 'Time' dropdown menu with a search icon, a 'Risk' search input, an 'Issue' dropdown menu with a search icon, a 'CREATE' button, and a 'START' button. The 'FORM ELEMENTS' panel on the right has a blue header and a close button. It contains three sections: 'Roles' with a plus icon, 'Actions' with a minus icon and a green border, and 'Other' with a plus icon. The 'Actions' section lists four options: 'Open a report', 'Export Data', 'Open a form', and 'Open Assessment Scoping'. At the bottom of the panel, there is a checkbox labeled 'Enable Comments' which is currently unchecked.

Form actions on the Edit Configurable Form page.

Open a Report Form Action

The report action element allows end users to open [reports](#) directly from an object instead of through a [report view](#). For example, if the report action was added to a standard form for the Location object type, when a user was working in a location object, they could click the "View Incidents at this Location" action button to view a report that outlines details about the incidents that occurred in that city.



Clicking on a report action on an existing object will display a related report. In this case, clicking View Incidents at This Location will display the Incidents by Location Report with the Toronto object as its focus.

To add the Open a Report action to a standard form:

1. If the form is not already open, click the  icon in the top bar > **Configurable Forms** in the **Views** section, then select a form.
2. Click the  icon in the **Actions** section of the **Form Elements** palette to expand it.
3. Drag and drop the **Open a Report** element to the canvas, which will automatically display the **Add Component** screen.



The **Open a Report** form action should only be added to forms for existing object types. See [Form Actions Overview](#) page for more information.

4. Enter text to display on the clickable button in the **Button Text** field.
5. Select a report from the **Report** dropdown menu. You can only select reports that are related to the current configurable form's object type.

Add Component

Button Text

View Incidents at This Location

Report

Incidents by Location Reports

SAVE

CANCEL

The Add Component screen for the report form action.

6. Click **Save** to return to the canvas.
7. To edit the action, hover your cursor over the element on the canvas, then click the  icon.

Export Data Form Action

When the **Export Data** action is added to a standard form, it allows users to open a **Data Analytics Export** report directly from an object instead of an activity [view](#) or [action](#) . These report types are specifically designed to export object data (properties, fields, workflow states, relationships, and references) into an Excel spreadsheet and therefore do not display object data through report elements.

Before this element can be added to a form, a **Data Analytics** report must be created for object type. See the [Create a Data Analytics Export Report](#) article for more information.

The image shows two side-by-side screenshots. The left screenshot is titled 'Location Review' and displays a form for a location named 'Montreal'. It includes fields for 'Location Name', 'Incidents at this location' (with a list of incidents like 'HP/Accident 2016/9/21'), and 'Address' (123 Street Avenue, Montreal, QB, 1A1 A1A). At the bottom, there is a button labeled 'EXPORT LOCATION DATA'. The right screenshot is titled 'Location Data Export' and shows the 'ANALYTICS EXPORT' interface. It contains a description of the tool, 'EXPORT DETAILS' (Report Name: Location Data Export, Report Focus: Location > Incident, Anchor Object: Montreal), and buttons for 'CANCEL' and 'EXPORT TO EXCEL'.

Clicking the button for the Export Data action on an object's form will display a data analytics report for that object.

To add the Export Data action to a standard form:

1. [Create](#) a data analytics report.

2. If the form is not already open, click the  icon in the top bar > **Configurable Forms** in the **Views** section, then select a form.

3. Click the  icon in the **Actions** section of the **Form Elements** palette to expand it.

4. Drag and drop the **Export Data** element to the canvas, which will automatically display the **Add Component** screen.



The **Export Data** form action should only be added to forms for existing object types. See [Form Actions Overview](#) page for more information.

5. Enter text to display on the button the user will click in the **Button Text** field.
6. Select a data analytics report from the **Report** dropdown menu. You can only select a report that's related to the current configurable form's object type.

Add Component

Button Text

Export Location Data

Export

Location Data Export

SAVE

CANCEL

The Add Components screen for the Export Data form action.

- Click **Save** to return to the canvas.
- To edit the action, hover your cursor over the element on the canvas, then click the  icon.

Open a Form Action

The **Open a Form** action allows end users to open a related standard form from within an existing object. For example, if the Open a Form action was added to a form for the Incident object type, a user viewing an existing incident object could click the "Witness Statement Form" action button to view, complete, or print the Incident Witness Statement form, then click Done to return to the originating object.

The screenshot shows the 'Incident Review' form for 'IC/Theft 2016/10/20'. It includes fields for 'Incident Name', 'Incident' (with a red 'Draft' button), 'Incident Report Writer' (Wendy Marx), and a 'Were there any witnesses?' dropdown set to 'Yes'. At the bottom, a button labeled 'WITNESS STATEMENT FORM' is highlighted with a green border.

The screenshot shows the 'Incident Review' form for 'IC/Theft 2016/10/20'. It includes fields for 'Created By' (Eva Luckett), 'Created On' (2016-10-20), 'Date & Time the Incident Occurred' (September 18, 2017 8:10 am), 'Employee?' (No), and a 'What Happened?' text area containing a witness statement. Below this are 'People Involved' and 'Interviews' sections.

Clicking on a form action button on an existing object will open a related form. In this case, clicking the Witness Statement Form button will open the Incident Witness Statement form.

To add the Open a Form action to a standard form:

1. If the form is not already open, click the  icon in the top bar > **Configurable Forms** in the **Views** section, then select a form.
2. Click the  icon in the **Actions** section of the **Form Elements** palette to expand it.
3. Drag and drop the **Open a Form** element to the canvas, which will automatically display the **Add Component** screen.



The **Open a Form** action should only be added to standard forms for existing object types. See [Form Actions Overview](#) page for more information.

4. Enter text to display on the clickable button in the **Button Text** field.
5. Select a form from the **Form** dropdown menu. You can only select forms that are related to the current configurable form's object type.

Add Component

Button Text

Witness Statement Form

Form

Incident Witness Statement

SAVE

CANCEL

The Add Component screen for the form action element.

6. Click **Save** to return to the canvas.
7. To edit the action, hover your cursor over the element on the canvas, then click the  icon.

Open Assessment Scoping Form Action

The **Open Assessment Scoping** form action provides access to the [scoping tool](#) where users can review, filter, and add focus objects to complete the launch of an assessment. This action requires the use of a [navigation form](#) created for the same object type as the assessment [focus](#) or with the same [data definition](#) as the assessment.

This action can be added to standard forms for assessments, however, the action will not be displayed until the assessment is moved out of the creation state.

Risk Assessment Review

Risk 33

Risk Assessment Name

Risk 33

Time

Q2

Business Unit

Edmonton

ADD PROCESSES

RISK 33

Q2 - Time | Edmonton - Business Unit

EDIT ASSESSMENT DETAILS

Add a Process to your assessment from the list below. If it's necessary, you can add multiple Processes to focus on. You'll be able to perform more granular scoping before you confirm the scope of your assessment.

Filters

By Name

By Assessment Type

Q Select one...

By Dimension

Q Select one...

By Description

By Unique ID

By state

P-3 CORE-10097 PROCESS 1-1

Library

DEFAULT

ADD TO SCOPE

PAST ASSESSMENTS

P-3 EXTEND OUR REACH AND INFLUENCE

Library

DEFAULT

ADD TO SCOPE

PAST ASSESSMENTS

P-3 DELIVER AN EXCEPTIONAL CUSTOMER EXPERIENCE

There are currently 0 objects added and ready for review

Clicking on the *Open Assessment Scoping* form action on an existing assessment opens the *scoping tools* where *focus objects* can be added.

To add the Open Assessment Scoping action to a form:

1. Ensure the appropriate [data definition](#) and [navigation form](#) has been created.
2. If the form is not already open, click the  icon in the top bar > **Configurable Forms** in the **Views** section, then select the appropriate form.
3. Click the  icon in the **Actions** section of the **Form Elements** palette to expand it.
4. Drag and drop the **Open Assessment Scoping** element to the canvas, which will automatically display the **Add Component** screen.
5. Enter text to display on the clickable button in the **Button Text** field.
6. Select a [navigation form](#) from the **Navigation Form** dropdown menu. The options in this menu are navigation forms with the same object type as the assessment focus or with the same data definition.

Add Component

Button Text

Start Scoping

Navigation Form

QCA - Nav for Scoping

SAVE

CANCEL

The Add Component screen for the assessment scoping form action.

- Click **Save** to return to the canvas.
- To edit the action, hover your cursor over the element on the canvas, then click the  icon.

Free Form Text (Other) on Forms

Through the free form text element, you can add headers, titles, instructions, or additional information to your configurable forms. Text can be styled using [Markdown](#) formatting.

Incident Form

Enter the type of incident, your initials and the date the incident was created in the **Name** field below. For example, *EL/Hazard 2016/10/26*

Name

Free form text added to a form.

To add free form text on a configurable form:

1. After adding the free form text element to your form, hover your cursor over the element, then click the  icon.
2. Enter the text in the **Content** text box.
3. **Optional:** Apply [Markdown](#) formatting to the text. To view popular styles, click the  icon next to **Basic Markdown Formatting**.

Edit Component Display
X

Content

Create a New Incident

Enter the type of incident, your initials and the date the incident was created in the **Name** field below. For example, EL/Hazard 2016/10/26

Basic Markdown Formatting

HEADERS

h1

h2

h3

h4

EMPHASIS

italic

bold

~~strikethrough~~

LISTS

Unordered

-Item 1

-Item 2

-Item 3

Ordered

1. Red

2. Green

3. Blue

LINKS

inline link

[Display text]

([http\(s\)://www.link.com](http(s)://www.link.com))

inline link with text

[Display text]

([http\(s\)://www.link.com](http(s)://www.link.com))

"Link Homepage"

images

![alt text]

([http\(s\)://www.image.com](http(s)://www.image.com))

CLOSE

Free form text styled with Markdown formatting.

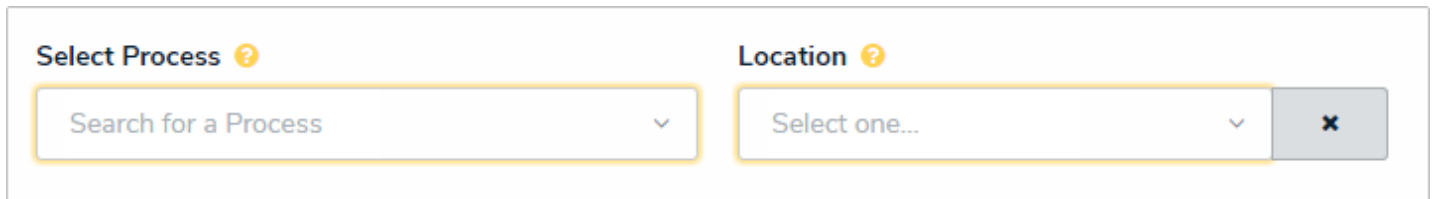
- Click **Close** when finished.

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301

Assessment Context (Other) on Forms

If you're creating a configurable form for an [assessment](#), you must include the **Assessment Context** element, which will add fields for the assessment's [dimensions](#) onto the form. If this element is not added to the form, you will not be able to successfully create a new assessment object.



The image shows a form element titled "Assessment Context (Other) on Forms". It contains two dropdown menus. The first is labeled "Select Process" with a yellow question mark icon. Below it is a search bar with the placeholder text "Search for a Process" and a downward arrow. The second is labeled "Location" with a yellow question mark icon. Below it is a dropdown menu with the placeholder text "Select one..." and a downward arrow. To the right of the "Location" dropdown is a grey button with a black "x" icon.

The Assessment Context element on a form. This element adds the assessment's dimensions to the form, which are required when creating a new assessment instance.

Comments

The **Comments** element allows users to leave comments on objects. When enabling comments on a form, note that:

- Clicking **Reply** will create a new comment thread.
- You can tag other users in both comments and replies. To do so, type the @ symbol and begin typing the user's name, then click to select the user. You can tag more than one user per comment or reply.
- Tagged users will receive an email notification with a link to the object where the comment is posted, however, if that user doesn't have permission to view the object, he or she will not be able to view the object or comment.
- If a user makes a comment and their account is later deleted, their comment remains intact.
- To edit a comment, click the text within the comment. Comments marked as resolved cannot be edited.
- Disabling comments on a form does not delete the comments. They will reappear on the form once comments are enabled.
- Comment activity is captured in the [Audit Trail](#).

COMMENTS

Sheba Boudreau July 14, 2017 8:36 AM

Mark as resolved ☐

Eva Luckett Please ensure you upload the spreadsheet.

Reply

Type here to add a comment

A comment as it appears on a form.

To enable comments, which appear at the bottom of an object, click the



icon beside **Enable Comments** in the **Form**

Elements palette. To disable comments, click the



icon.

Form Sections

Sections are the areas on the **standard form canvas** where you can drag and drop **form elements** (e.g. fields, relationships, formulas, etc.).

Sections are added to forms by clicking **+ Section** on the form canvas. Once a section has been added to a form, you can:

- Configure its width;
- Center it;
- Provide a section title;
- Display the section as tabs or as collapsible and expandable; and
- Create rules to specify if the section will be visible on the form.

See [Add a Section to a Form](#) for more information on configuring a section's title and display (including tabs and collapsible sections). See [Control Section Visibility](#) for more information on creating section rules.

FORM CANVAS

Object Name

Drag and Drop Elements or Sections

Incident Details

Date of submission

Date & Time the Incident Occurred

Incident Type

+ SECTION

+ SECTION

A form canvas displaying a configured section.

Risks

Risk Likelihood

Rare

Risk Impact

Moderate

A collapsible section with a title.

ControlsRisks

Control Effectiveness

Ineffective

Comments

Needs review.

A tabbed section.

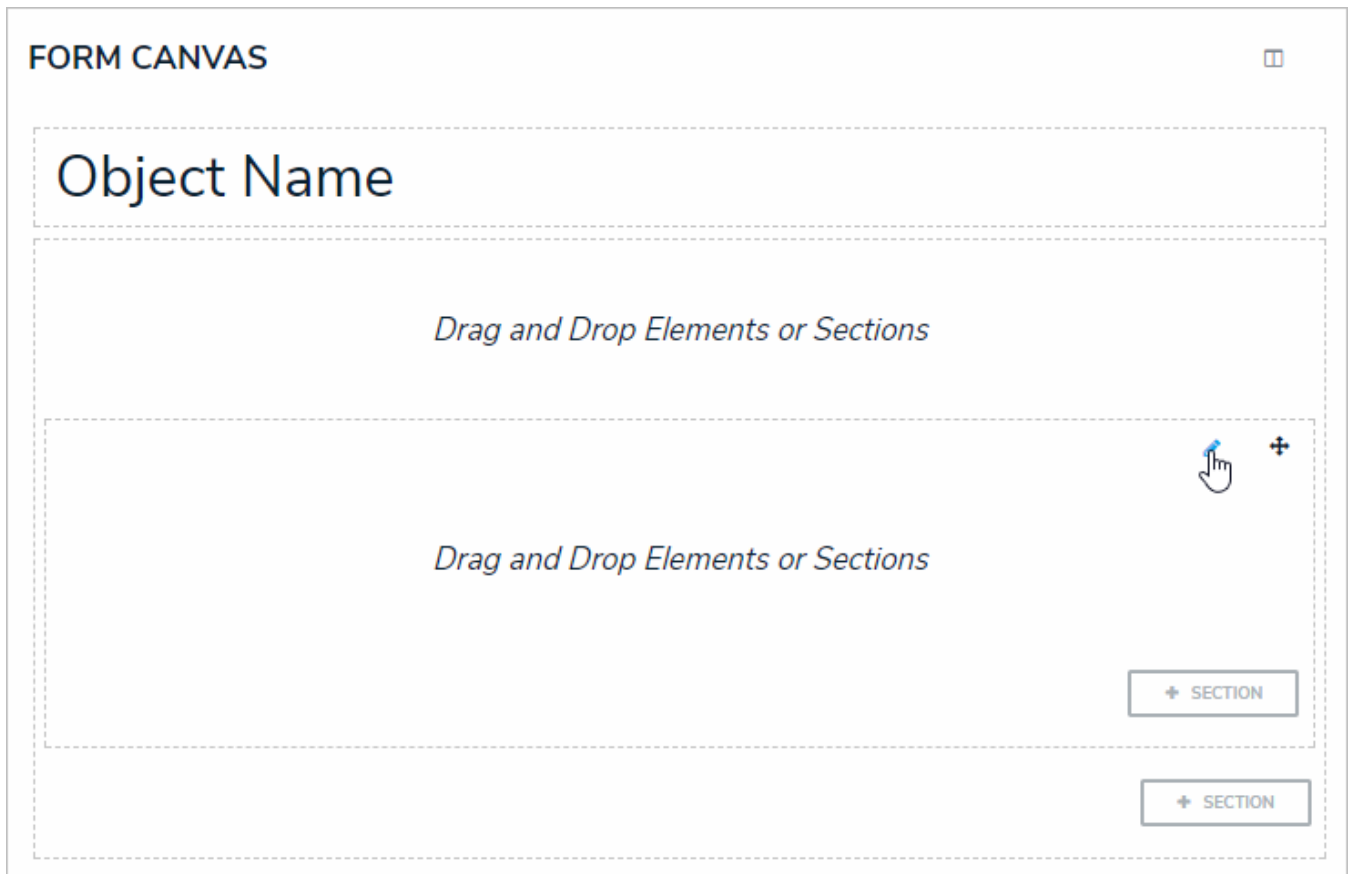


A single section cannot be both tabbed and collapsible.

Add a Section to a Form

To add a new section to a standard form:

1. [Create a new form](#) or open an existing form by clicking  icon in the top bar > **Configurable Forms** in the **Views** section, then selecting a form.
2. Click + **Section** on the form canvas.
3. Click the  icon in the top-right corner of the new section to display the **Edit Form Section** screen.



The screenshot shows the 'FORM CANVAS' interface. At the top, there's a header 'FORM CANVAS' and a close icon. Below it, a dashed box contains the text 'Object Name'. Underneath, another dashed box contains the text 'Drag and Drop Elements or Sections'. Inside this box, there's a smaller dashed box representing a new section. This section has a dashed border and contains the text 'Drag and Drop Elements or Sections'. In the top-right corner of this section, there's a pencil icon and a plus icon. Below the section, there are two buttons labeled '+ SECTION'.

A new section on the form canvas.

4. Select a width from the **Section Width** section. By default, **100** (full size) is selected.

☒ ☐ Make Section Collapsible

Collapsible Default on Load

☒ Expanded ☐ Collapsed

The collapsible section settings.

8.



A single section cannot be both collapsible and tabbed.

9. To create section tabs:

- Click the **Enable Tabs** icon.
- Click **+Add Another Tab**.
- Enter a name for the tab in the text field.
- Continue steps a-c to continue adding more tabs as needed. To delete a tab, click the icon.

☒ ☐ Enable Tabs

Tab 1

Risks

Tab 2

Controls

+ ADD ANOTHER TAB

The tabs settings.

10. Click **Done** to return to the form canvas.

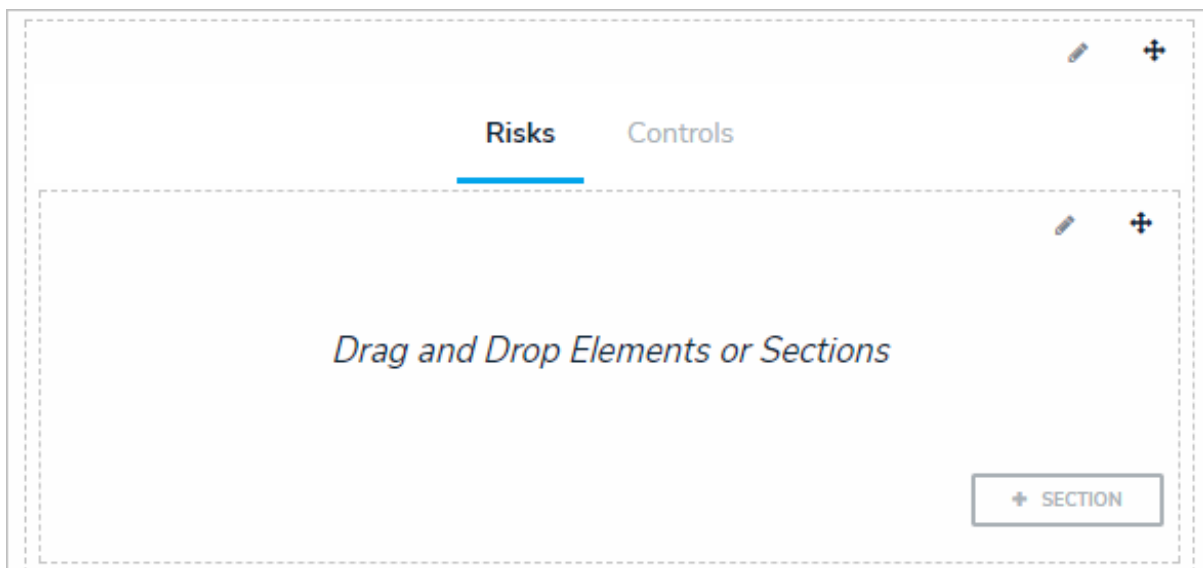
11. If the new section is collapsible, click the icon to expand it (if necessary) and [add elements](#) . Click the icon

to collapse the section, as needed.



A collapsed section on the form canvas.

12. If the new section has tabs, click a tab and [add elements](#) . These elements will appear on the form only when that specific tab is selected.



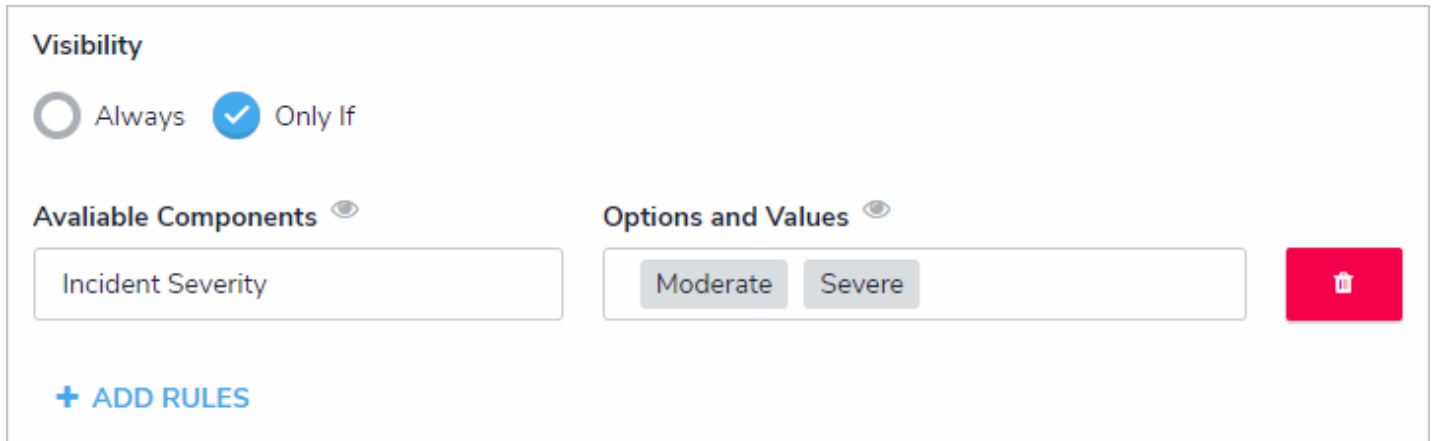
A section with tabs on the form canvas.

13. Repeat steps 2-11 to continue adding sections as needed.
14. To reposition a section on the form canvas, click the  icon in the top-right corner of the section, then drag and drop it to a different area on the canvas.

Control Section Visibility (Dynamic Forms)

The **Visibility** settings in **Edit Form Section** give administrators the option of always displaying a section and its elements on a standard form or only displaying the section once specific **formula** values (ranges) or **select list** options are selected in another section on the form. For example, when creating a new incident object, the Witness Details section is hidden from the form unless the end user chooses Yes from the Witnesses? dropdown menu.

To specify which formula values or select list options must be selected to display a certain section, at least one **rule** must be created, where you can choose a select list and/or formula, then select the required options or values. If multiple values or options are selected for a single formula or select list, any one of those values or options can be selected by a user to reveal the section (e.g. selecting Moderate OR Severe on the Incident Severity select list will successfully display the form).



The screenshot shows the 'Visibility' configuration panel. At the top, there are two radio buttons: 'Always' (unselected) and 'Only If' (selected). Below this, there are two sections: 'Available Components' and 'Options and Values'. 'Available Components' contains a text input field with 'Incident Severity'. 'Options and Values' contains two buttons, 'Moderate' and 'Severe', and a red trash icon to the right. At the bottom left of the panel is a blue '+ ADD RULES' button.

The Visibility settings. In this case, the end user must select Moderate OR Severe from the Incident Severity select list before the section is displayed.

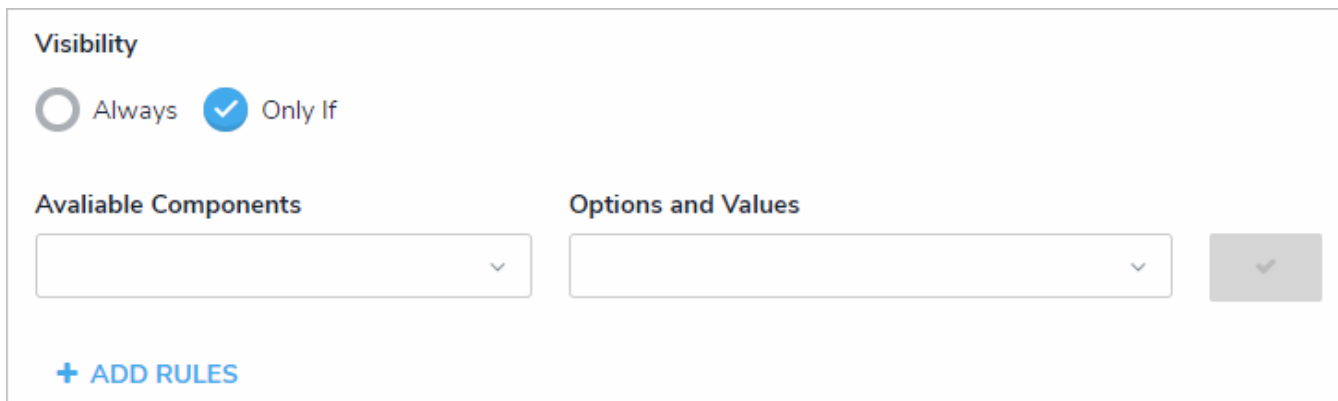
When creating sections with controlled visibility, note that:

- It's possible to configure cascading visibility by configuring additional sections to be displayed only when specific values or options are selected within another previously hidden section. For example, if a user chooses Yes from the Employee? select list in previously hidden Witness Details section, the Employee Details section will be displayed.
- Multiple rules can be added to a single section, however, doing so will create AND criteria. This means that at least one value or option must be selected from every rule to display the section.
- Adding formulas without ranges to a rule or adding formulas to rules on forms used to create new objects will prevent the section from being successfully displayed even when the criteria has been met.
- Administrators should review the width and layout of all sections on the form to ensure the hidden section displays correctly when visible.
- Selecting multiple options or values creates OR criteria. For example, if a user chooses Theft, Assault, OR Vandalism from the Incident Type select list, the Illegal Acts section will display.

To control a section's visibility:

1. [Create a new form](#) or open an existing form by clicking  icon in the top bar > **Configurable Forms** in the **Views** section, then selecting a form.
2. Click + **Section** on the form canvas.
3. Click the  icon in the top-right corner to display the **Edit Form Section** screen.
4. Select the **Only If** in the **Visibility** section. By default, **Always** is selected. If you want this section to be visible at all times, leave **Always** selected.

5. Click + **Add Rules**



The screenshot shows the 'Visibility' configuration interface. At the top, under the 'Visibility' heading, there are two radio buttons: 'Always' (unselected) and 'Only If' (selected). Below this, there are two dropdown menus labeled 'Available Components' and 'Options and Values'. The 'Available Components' dropdown is empty, while the 'Options and Values' dropdown contains a single greyed-out option with a checkmark icon. At the bottom left of the panel is a blue '+ ADD RULES' button.

The Visibility section of the Edit Form Section screen.

6. Choose a select list or formula with ranges from the **Available Components** dropdown menu.

 Only formulas with ranges should be selected.

7. Choose one or more select list options or formula ranges from the **Options and Values** dropdown menu. Selecting multiple options or values creates OR criteria. For example, if a user chooses Theft, Assault, OR Vandalism from the Incident Type select list, the Illegal Acts section will display.

8. Click the  icon beside the rule to save it.

9. **Optional:** Click +**Add Rules** to create an additional rule, then repeat steps 6-8 above.

 Creating additional rules will create AND criteria. This means that at least one range or option must be selected from every rule in order to display the section.

10. Click **Done** to save the visibility settings.

11. To modify a rule, it must first be deleted by clicking the  icon, then recreating it.

Edit or Delete a Form Section

To edit or delete a form section:

- 1. If needed, click **Administration > Configurable Forms** to open an existing form.
- 2. To reposition a section on the form canvas, click the  icon in the top-right corner of the section, then drag and drop it to a different area on the canvas.
- 3. Click the  icon at the top-right corner of the section to display the **Edit Form Section** screen.

Edit Form Section

Section Width

25

33

50

66

75

✓

100

×

Centered

Section Title

×

Make Section Collapsible

Visibility

✓

Always

Only If

×

Enable Tabs

SECTION

✓

DONE

The Edit Form Section screen.

- 4. Make changes to the settings as needed. See the [Add a New Section to a Form](#) for information on enabling tabbed or collapsible sections and [Control Section Visibility](#) for information on creating rules.
- 5. If the section is empty (it does not contain any elements), click the  **SECTION** icon, then **Yes** to confirm. If the section contains elements:
 - a. Click **Done** to return to the form canvas.
 - b. Hover your cursor over each element in the section, then click the  icon to remove the element from the section.

The screenshot shows a web form titled "Risks". At the top right is a minus icon in a square. Below this is a section titled "Risk Likelihood" with a light blue background. To the right of the title is an eye icon and the text "MARK READ-ONLY". Further right are a pencil icon and a red circle with a white minus sign. A mouse cursor is clicking the red minus icon. Below the "Risk Likelihood" section is a "Risk Impact" section with a white input field and a dropdown arrow. At the bottom right is a button labeled "+ SECTION".

Removing an element from a section.

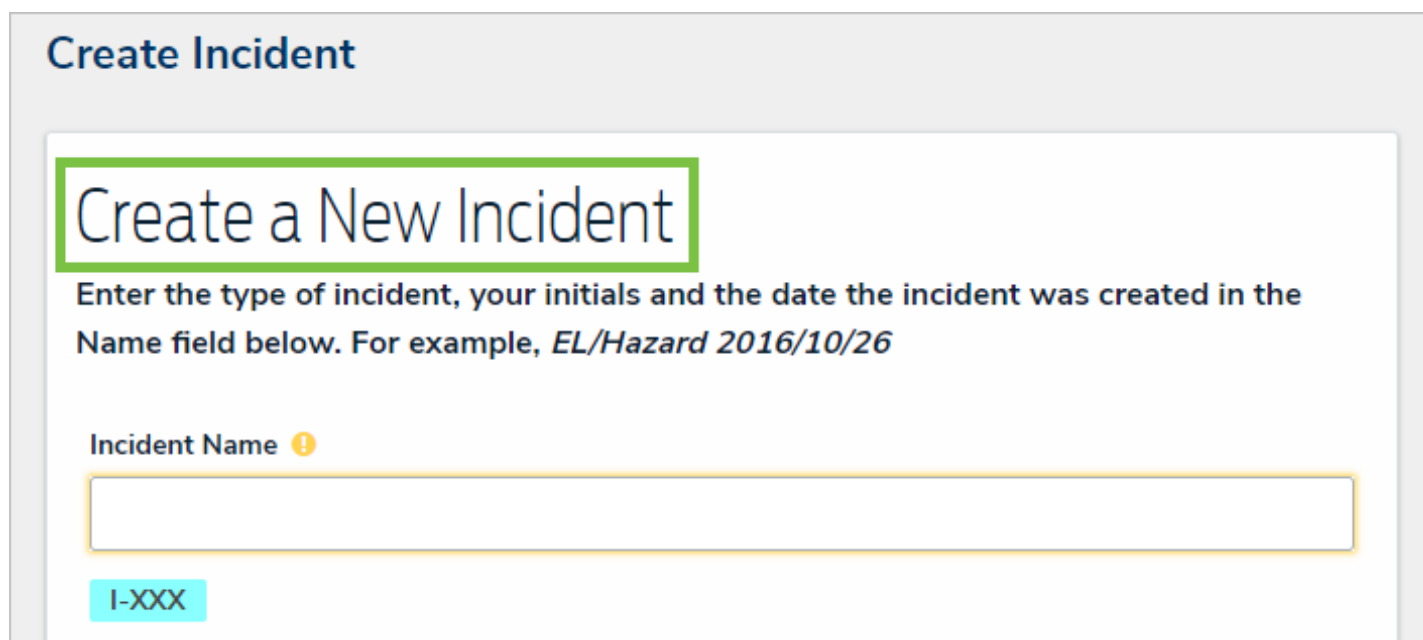
- c. Click **Yes** to confirm.
- d. Continue removing elements from the section as needed.
- e. Click the  icon at the top-right corner of the section to return to the **Edit Form Section** screen.
- f. Click the  **SECTION** icon, then **Yes** to confirm.

Configure a Form's Title

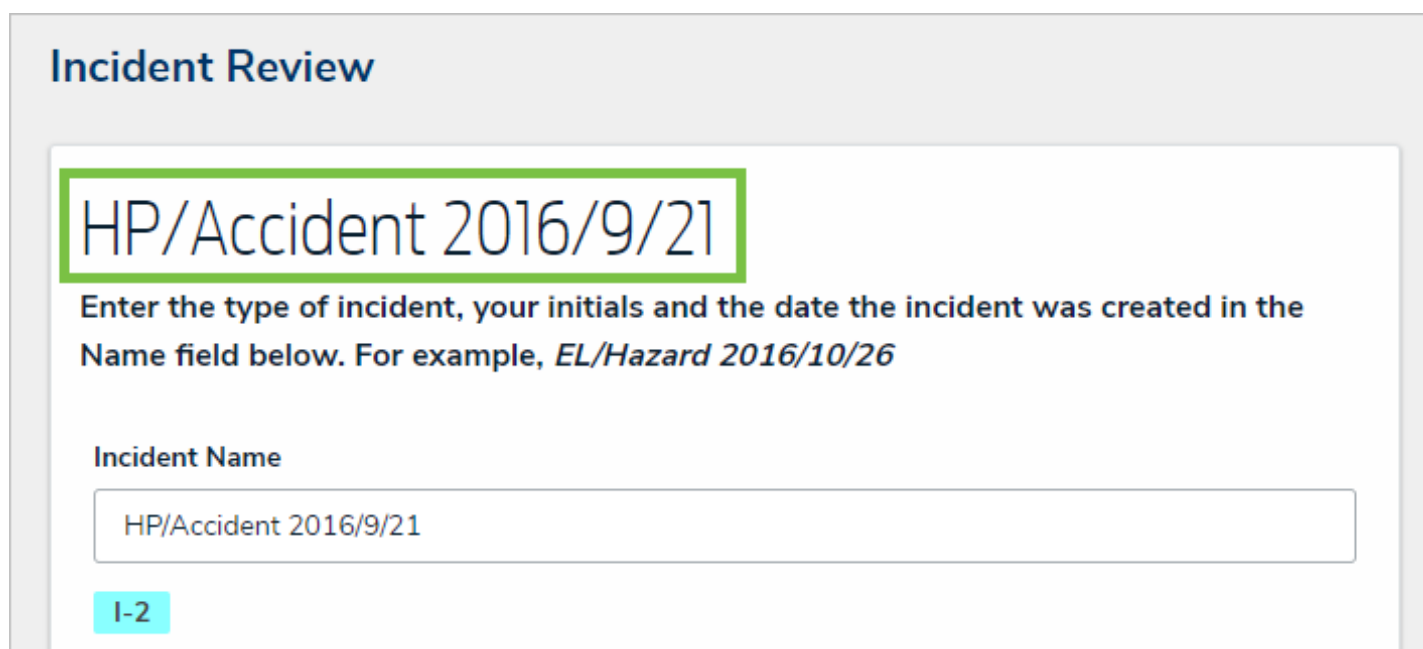
Form titles are the headers that appear at the top of every standard form.

By default, when a user creates a new object through a standard form, the name of the form will be displayed as **Create a New [Object Type name]**. Once the object is created, the **Create a New [Object Type name]** will be replaced with the value entered into the Name property (including [concatenations](#)). Default titles can be changed by end users by clicking the title to edit it, provided it is not marked as read-only and the [Edit permissions](#) are enabled on the user's role.

Administrators have the option of creating custom titles, however, custom titles **cannot** be edited by end users and the title will remain the same across new and existing objects.



A new, unsaved object displaying the default form title (i.e. "Create a New [Object Type name]").



An object displaying the value entered into the Name property, which is the default for existing objects.

Incident Review

Incident Form

Enter the type of incident, your initials and the date the incident was created in the Name field below. For example, *EL/Hazard 2016/10/26*

Incident Name

HP/Accident 2016/9/21

I-2

An object displaying a custom form title. Custom titles appear the same for both new and existing objects.

To configure a standard form title:

1. If the form is not already open, click the  icon in the top bar >**Configurable Forms** in the **Views** section, then select the appropriate form.
2. Hover your cursor over the form title on the canvas, then click the  icon to display the **Edit Form Title** window. By default, the title displays **Object Name**.

FORM CANVAS

Object Name

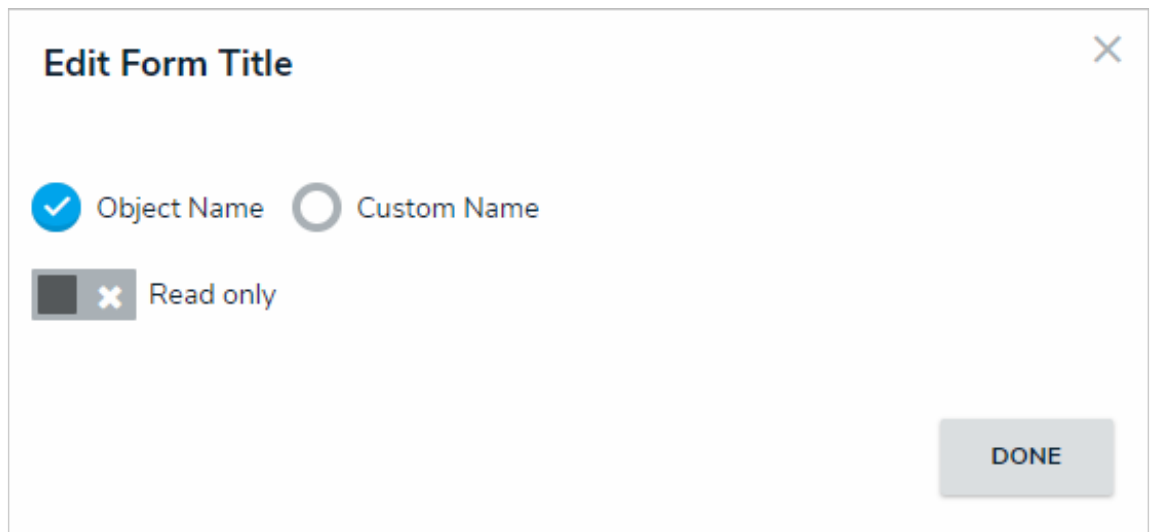
Drag and Drop Elements or Sections

 SECTION

The form title section on the canvas. Object Name appears by default.

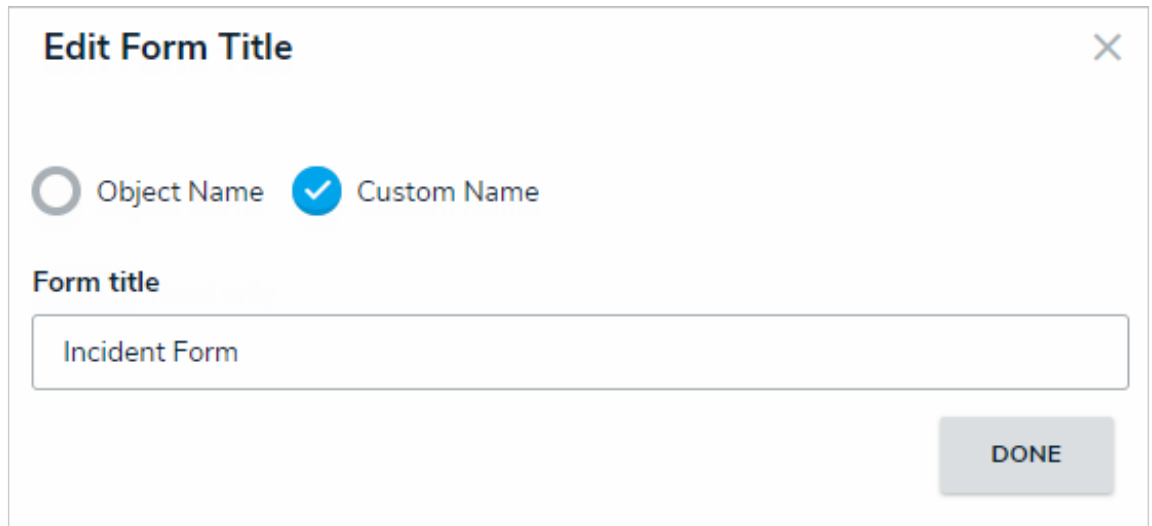
3. Select either **Object Name** or **Custom Name**:
 - If you selected **Object Name** (to display the object's Name property as the form title):

- a. **Optional:** Click the  icon beside **Read only** to mark the title as read-only. Doing so will prevent users with **Edit** permissions enabled from modifying the title. Click the  icon to disable read-only.



The Object Name option on the Edit Form Title screen.

- If you selected **Custom Name**:
 - a. Enter the custom name in the **Form title** field.



The Custom Name option on the Edit Form Title screen.

 Custom Name titles are read-only.

4. Click **Done**.

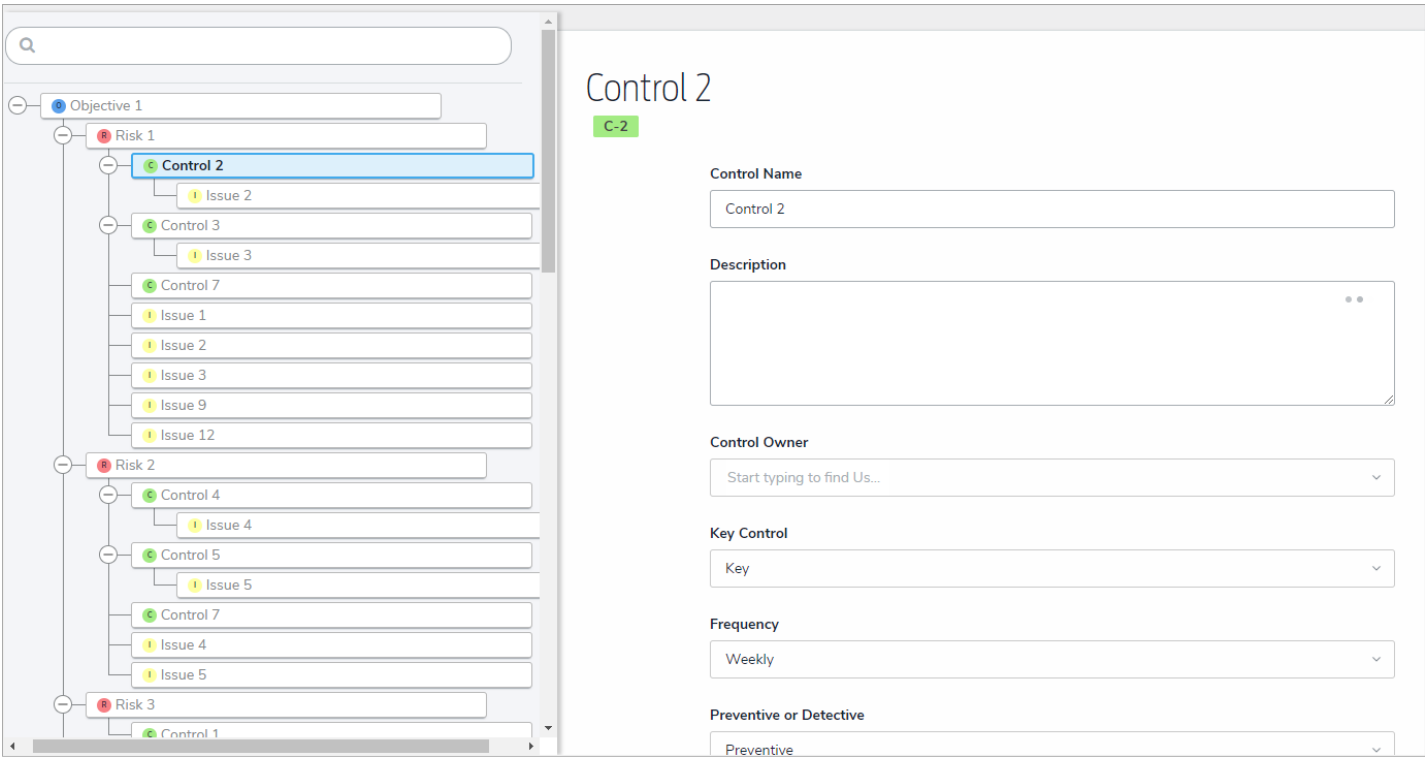
Navigation Form Overview

A **navigation form** is configurable form type that uses a [data definition](#) to provide visual context for users working with objects or assessments. This form type makes it easier to understand how each object relates to one another while providing easy access to those objects without leaving the current form.

Whereas a [standard form](#) merely contains the elements and fields added by an administrator, objects in a navigation form are represented as a hierarchical tree with expandable nodes in a panel to the left, starting with the object from the anchor object type and moving down the data path. Clicking one of these objects will display a standard form or report to the right of the tree, without leaving the navigation form.

If a user doesn't have permission to view a specific object, that object and any others below it in the tree will not be visible. Users can narrow down which objects are displayed in the tree by using the search field in the left panel.

Navigation forms are available to end users through a [view](#) , through the link emailed to a user through the [Messaging action in a workflow](#) , or when clicking an object on the [My Tasks](#) page. These forms are also used to scope and launch assessments. See the [Scope & Launch](#) section for more information.

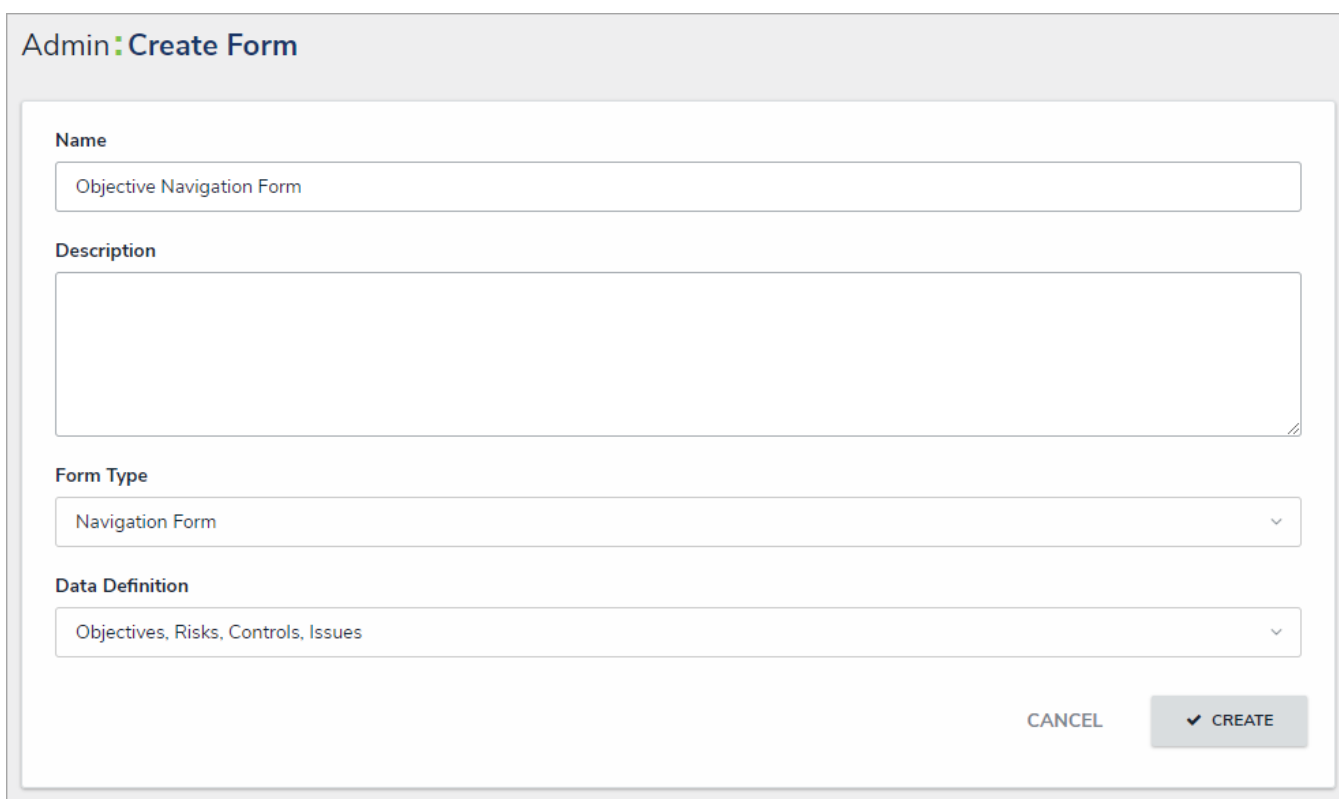


A navigation form as it appears to users in a view.

Create a Navigation Form

To create a new navigation form:

1. Click the  icon in the top bar > **Configurable Forms** in the **Views** section.
2. Click **Create Configurable Form**.
3. Enter the name of the form in the **Name** field.
4. **Optional:** Enter a brief description of the form in the **Description** field, which will appear below the form's name while editing the form and on the **Configurable Forms** landing page.
5. Select **Navigation Form** from the **Form Type** dropdown menu.
6. Select a data definition from the **Data Definition** dropdown menu. This will determine which objects will appear in the tree on the form. If a user doesn't have permission to view an object, that object and any others below it in the tree will not be visible. See [Data Definitions](#) for more information.



The Create Form page.

7. Click **Create** to display the **Edit Navigation Form** page.

Admin: **Edit Navigation Form**

OBJECTIVE NAVIGATION FORM

Object Type: Objectives

Data Definition: Objectives, Risks, Controls, Issues

[-] Objectives

[-] Risk

[-] Issue

[-] Control

[-] Issue

DONE

The Edit Navigation Form page.

8. Click the first object type in the tree (this is the anchor object type).
9. Select either **Form** or **Report** to choose what is displayed to a user when they're viewing the navigation form.
 - If you selected **Form**:
 - a. Select a form for the object type from the dropdown menu.
 - b. **Optional:** Deselect the **Use this form for all workflow states** checkbox if you wish to specify which form to display for each state in the object type's workflow. If you deselected this checkbox, select a form from the dropdown menus below.

Objectives

☒ Form ☐ Report

Objective - Create

☒ Use this form for all workflow states.

Select a form to render per workflow state

Creation

Objective - Create

Active

Objective - Create

Selecting a standard form to display for an object type.

- If you selected **Report**:
 - a. Choose a report for the object type from the **Select a report to render** dropdown menu. If you do not select a specific form or report to display, any form selected in the object type's [workflow permissions](#) for its current state will display by default.

Objectives

☐ Form ☒ Report

Select a report to render

RM - Risk and Control Matrix By Objective

Selecting a report to display for an object type.

10. Continue clicking through each object type in the tree to choose which form or report is displayed to the user.
11. Click **Done** when finished.

Once the form is successfully created and configured, it can be added to a [view](#), the [Messaging action in a workflow](#), or when clicking an object on the [My Tasks](#) page.

Edit or Delete a Configurable Form

To edit or delete a configurable form:

1. Click the  icon in the top bar > **Configurable Forms** in the **Views** section.
2. Click the form you want to edit or enter the name of the form in the **Search** field, then click it to display the **Edit Configurable Form** page.
3. To edit a navigation or standard form's name, description, and/or **priority**, click the  icon next to the form's name.
4. To edit a standard form's **title**, **section**, or **element**, click the  icon on the canvas to see additional options.
5. To delete the configurable form, click the  icon, then click **Yes** to confirm.
6. Click **Done** when finished.

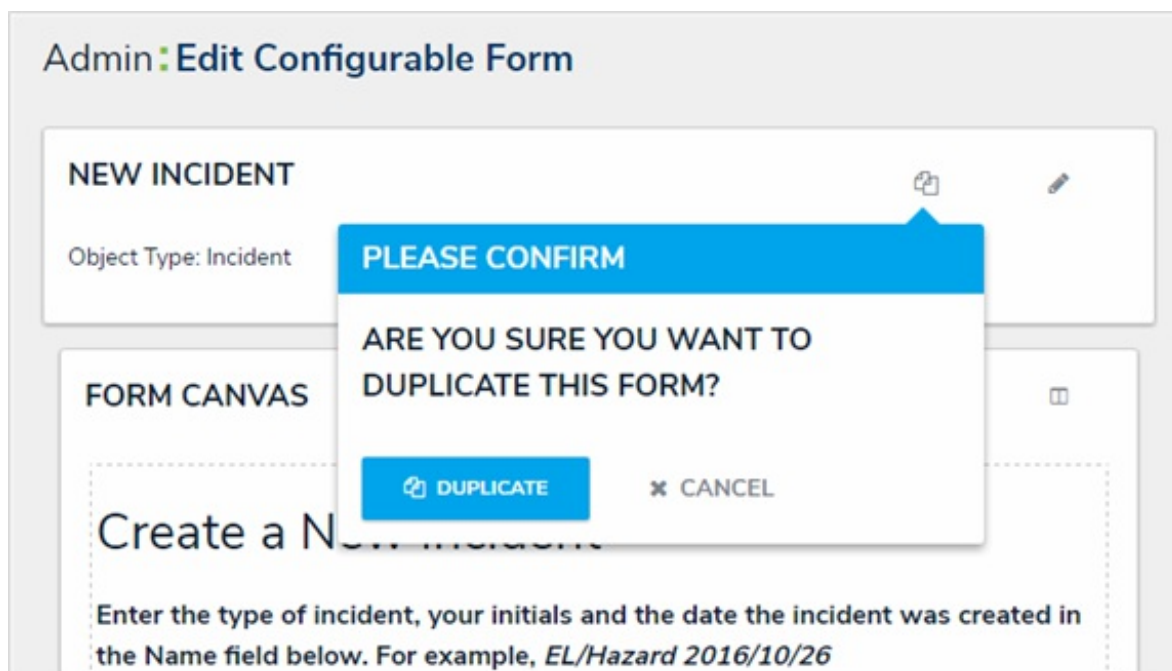
Create a Duplicate Configurable Form

Creating a duplicate form allows you to create similar forms (for both navigation and standard form types) for the same object type without having to entirely recreate a new form.

Newly duplicated forms are created with a _COPY suffix (e.g. creating a duplicate of a form called “New Incident” will create a new form called “NEW INCIDENT_COPY”). You can edit the name and description for duplicate navigation and standard forms, and the elements and sections on a duplicate standard form, however, a duplicate form can only be associated with the same object type as the original form.

To create a duplicate configurable form:

1. Click the  icon in the top bar > **Configurable Forms** in the **Views** section.
2. Click the form you want to duplicate or enter the name of the form in the **Search** field, then click it to display the **Edit Configurable Form** page.
3. Click the  icon to the far right of the form's name.
4. Click **Duplicate** to confirm and to display the **Edit Configurable Form** page for the duplicate.



Duplicating a form.

5. If needed, click the **X** icon to close the **Form Palette**, then click the  icon to the right of the form's name to edit the name and description as necessary.

Admin : Edit Configurable Form

NEW INCIDENT_COPY

Object Type: Incident

FORM CANVAS

Create a New Incident

Enter the type of incident, your initials and the date the incident was created in the Name field below. For example, *EL/Hazard 2016/10/26*

A duplicate form. Duplicates are created with a _COPY suffix in their names, which can then be edited by clicking the pencil icon.

6. Click the  icon to display the **Form Palette** and add form elements as needed.



See the [Add Elements to a Standard Form](#) section for more details on configuring each form element.

Reports Overview

With the **Reports** feature, you can create two report types: a traditional report that displays data through charts, tables, and heat maps, and a [Data Analytics Export](#) report.

A traditional report gives you the option of displaying object or assessment data via one or more of the following report elements:

- Tables;
- Pie charts;
- Half-pie charts;
- Heat maps;
- Bar charts; and
- Column charts.

A [Data Analytics Report](#) does not display data, however, this report allows end users to export object data into an Excel spreadsheet.

Only administrators can create reports, but end users can view and [star](#) reports, apply filters, and export table data once a report is added to a view or [form action](#) . If the report is for data export, it can be accessed through activity views, actions, or form action.

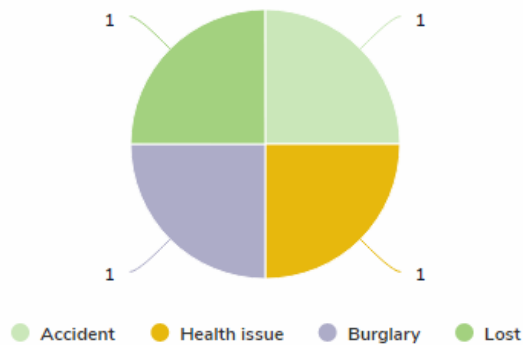
All reports require a [report focus eligible](#) data definition and one more or more [data series](#) for reports with elements.

Incidents by Location Reports



MONTREAL

REPORT FOCUS



Incidents at this location Name	What Happened?	Incident Type	Location
IC/Burglary 2016/11/16	Sheba Boudreau was opening up the office and saw that one of the windows by the back door was broken. It looks like a cell phone and laptop computer were stolen.	Burglary	Montreal, Toronto
KD/Emergency 2016/07/03	Hollie Peel was having an asthma attack. Sheba Boudreau helped her take her rescue inhaler, while Wendy Marx called the ambulance. She's okay now.	Health issue	Montreal
KD/Lost 2016/04/02	A clerk in the officer reported that she lost her cell phone. Cannot confirm at this time if it was stolen, but I sent out a notice to all employees to keep an eye out.	Lost	Edmonton, Montreal, Toronto
HP/Accident 2016/9/21	A customer reported that a elderly gentleman fell in the hallway. The floor didn't appear to be wet and there didn't seem to be any other hazards. Security confirmed the same with me.	Accident	Montreal, Toronto

A report with pie charts and a table as it appears to end users in a view.

Location Data Export

ANALYTICS EXPORT

This tool is used to export all data defined by the below parameters into an Excel format that can be consumed by third-party analytics tools. Note: permissions are applied on export.

EXPORT DETAILS

Report Name: Location Data Export

Report Focus:

Location > Incident

Anchor Object: Montreal

CANCEL

 EXPORT TO EXCEL

A data analytics report.

Report Focuses & Data Series

Reports rely on two types of [data definitions](#) : report focuses and data series.

A **report focus** is a data definition that broadly specifies which object type's data will be displayed in the report. A data definition cannot be report focus eligible if more than one unique object types on the same level have been selected. More specifically, when creating a report focus eligible definition, you can only select one unique leaf (object type) per each branch in the data path tree. A definition can be report focus eligible with multiple selections on one leaf **only** if those selections are for the same object type.

Admin : Edit Data Definition

REPORT FOCUS ELIGIBLE

DEFINITION

This is for reference only, and cannot be modified

[-] ROT Root Object Type ✓

[-] Branch

[-] LOT Leaf Object Type 3 ✓

[-] Branch (Reference)

[+] ROT Root Object Type 2 ✓

A report focus eligible data definition. This data definition is eligible because only one leaf (object type) has been selected per each branch on the data path.

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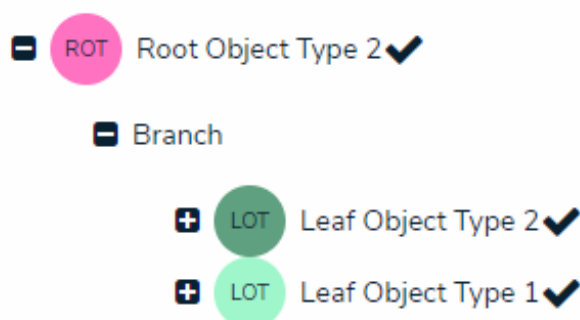
Admin : Edit Data Definition

NOT REPORT FOCUS ELIGIBLE



DEFINITION

This is for reference only, and cannot be modified



A data definition that is not report focus eligible because more than one leaf has been selected on a single branch in the data path, however, this definition may be used as a data series.



Because the structure of data definition resembles a tree, the anchor object type is also known as the root, the relationships and references on the anchor are the branches, and the object types within those relationships or references are the leaves on the branches.

When creating a new report (including a Data Analytics report), you must select at least one existing report focus eligible data definition. Additionally, for any reports that will display data through a report element, you must select a [data series](#) definition for each element you wish to display.

A **data series** is a sub-definition that's related to the report focus definition. When adding a report element you must select a data series definition which will more specifically define which object type data the element will display. The definitions you can choose from are populated based on the object type(s) selected in your report focus definition. For example, if you created a report using a focus that had the Location object type as the anchor and only object type in the data path, all definitions with Location selected in their data paths, either as the anchor or leaf, will appear as options when selecting a data series. Report focus eligible definitions can also be selected as data series definitions.

EXAMPLE

You need to create a report that assesses the effectiveness of the risks and controls in place for each location within your company. To do this, you would first create a data definition, called “Location Only,” with Location as the anchor and sole selected object type to be the report focus. You then create an additional definition with Location object type as the anchor and the Risk and Control object types (which are connected to Location through relationships) as the leaves, naming the definition “Risks & Controls.” Now, when you create a report, you can select the Location Only definition as the Report Focus and when you add a table, chart, or heat map, you can drill down into either the Risk or Control object types by selecting the Risks & Controls definition as the data series for each report element.

Admin **Edit Data Definition**

RISKS & CONTROLS

DEFINITION
This is for reference only, and cannot be modified

L

Location

✓

Risks

R

Risk

✓

Controls

C

Control

✓

The data path for a data series definition.

Admin

Edit Report

RISKS & CONTROLS BY LOCATION

Report focus: Location Only

Anchor: Location

Data: Location

+ ADD ANOTHER REPORT FOCUS

The Edit Report page showing the Location Only definition is selected as the report focus and the Location object type is both the anchor and leaf.

ADD PIE CHART

X

Select a data series

Select a Data Definition

Risks & Controls

Time Spent (Hrs)

The Select a data series dropdown menu that appears after adding a report element. The options in this menu are populated based on the report focus and its leaves, if any.

For more information on creating and viewing data definitions, see the [Data Definitions](#) section.



You can check if an object type is associated with data definitions on a report by going to **Administration > Object Types** clicking the object type to open the **Edit Object Type** page then reviewing the **Related Data Definitions** section in the **Overview** tab.

Create a New Report

When creating a new report, you must create the report container (instructions below), select an [anchor](#) , then create one or more [data definitions](#) . These instructions cover creating a report that will display object data through report elements. If you're creating a report for data export, see the [Create a Data Analytics Export Report](#) section for more information.

To create a new report:

1. Ensure the data definitions you intend to use for the report focus and data series have been created from the [Data Definitions](#) settings in the administrative settings.
2. Click the  icon in the top bar > **Reports** in the **Views** section.
3. Click **Create Report**.
4. Enter the name of the report in the **Name** field.
5. **Optional:** Enter a description of the report. This description will appear below the report's name on the **Reports** page.
6. Select **Report** from the **Type** dropdown menu. See the [Create a Data Analytics Export Report](#) if you're creating a report for data export.
7. Select a [report focus](#) from the **Report Focus** dropdown menu. For example, if you wish to create a report that displays data on the risks and controls at each location in your company, you would select a report focus with the Location object type as your anchor and no other object types (leaves) selected.

Admin

Create Report

Name

Risks & Controls by Location

Description

Type

Report

Report Focus

Location Only

CANCEL

✓ CREATE

8. **Optional:** Select additional, related report focus definitions from the **Report Focus** dropdown menu. Selecting another report focus will provide more data series options to choose from when adding a report element (table, chart, or heat map).
9. Click **Create** to display the **Edit Report** page.

Admin : Edit Report

Risks & Controls by Location

Report focus: Location Only Anchor: Location Data: Location

+ ADD ANOTHER REPORT FOCUS

Filters

▼ CONFIGURE FILTERS

Parameters

▼ CONFIGURE PARAMETERS

Report Elements

Display

+

Report Canvas

✓ DONE

10. **Optional:** Click **Add Another Report Focus** to include another report focus definition. Depending on the data path, selecting another report focus will provide more data series options to choose from when adding a report element (table, chart, or heat map).

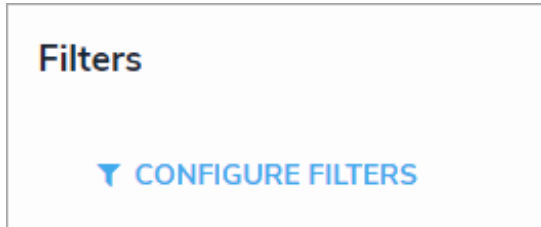
Once you've created the report and selected one or more report focus definitions, you can add charts, tables, or heat maps, [filters](#) , [parameters](#) , or [text](#) .

Add Filters to a Report

A report **filter** is an optional feature that allows end users viewing the report to refine the data shown in the pie charts, tables, or heat maps. The available filters are determined by the object types selected in the data definition(s).

To add filters to a report:

1. In the **Filters** section, click **Configure Filters**.



The Filters section.

2. From the **Configure Filters** palette, select one or more of the following filter options

- **State:** Filters the report data by the objects' current [workflow state](#) .
- **Role:** Filters report data by users or user groups in explicit [roles](#) that have been granted direct access to objects from the report's [data definition](#) .



A report component's data series determines if the Roles filter will be applied to that component. In other words, if the object types in a table, chart, or heat map's data series haven't been added to the role selected in the filter, it will not be applied to that particular report.

- **Date & Time/Select List:** Filters the report data by [date and time](#) and/or [select list](#) fields.
- **Formula:** Filters the report data by [formula](#) label.
- **Relationship:** Displays report data from a selected [relationship](#) object type and any related [reference](#) object type. For example, selecting the Risk 1 object type as a filter will also display all the Control objects that Risk 1 appears on through a relationship.
- **Object Type:** Displays report data from a selected object type or objects types.

3. Click the  icon when finished.

Add Parameters to a Report

A report **parameter** controls the data displayed in a report and **all** its elements. As parameters rely on the **data series** selected in the element(s), parameters cannot be applied until one or more **report elements** have been added to the **Report Canvas**.

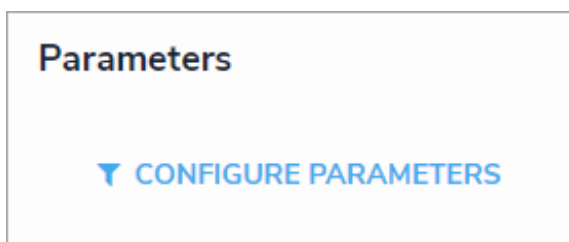


At this time, only the **By Role** parameter is available. Additional parameters will be available in future releases.

Only administrators can configure or apply parameters to reports.

To add parameters to a report:

1. In the **Parameters** section of the **Edit Report** page, click **Configure Parameters**.



The Parameters section.

2. Select a **data series** from the **Select Data Series** dropdown menu, which will determine which options are available in the remainder of the fields in the palette. If no options are appearing in this dropdown menu, ensure that at least one **report element** has been added to the **Report Canvas**.
3. Choose either the anchor object type (report focus), relationship, or reference from the **Select a Relationship** dropdown menu.

CONFIGURE PARAMETERS

SELECT DATA SERIES

Incidents by Location

SELECT A RELATIONSHIP

Incidents at this location

Incidents at this location

REFERENCE

LOCATION

Anchor

By Role (Incidents)

Select one...

Choosing a relationship from the selected data series.

- Select one or more roles from the **By Role ([Object Name])** dropdown menu. Only users in the role(s) selected in this field can view the report and its elements.

CONFIGURE PARAMETERS

SELECT DATA SERIES

Incidents by Location

SELECT A RELATIONSHIP

Anchor

By Role (Location)

Managers

x

The Configure Parameters palette with a role selected.

5. To remove the parameter, click the **x** icon beside the role(s) in the **By Role** dropdown menu.
6. Click the  icon in the top-right of the palette when finished.

Add a Table to a Report

Tables display selected data in text form and can be exported into a Word or Excel document from a [view](#) . Clicking on the data in any of the cells will display either the default form selected in the role permissions or an alternate form selected by an administrator in the table settings. Depending on the user's [role permissions](#) , the user may be able to view or edit the data in the form.

The following data can be selected to appear in a table:

- **Properties:** The properties saved to the object type, including Name, Unique ID, Description, External Reference ID, Created By, Created On, Modified By, Modified On, and [Assessment](#) Dimensions.
- **Fields:** Any [fields](#) saved to an object type, including plain text, numeric, date and time, select list, attachments, and formulas.
- **Relationships:** Displays a column with the same name as the [relationship](#) as well as the data saved to an object through the relationship. For example, in the screenshot below, the Location column represents the relationship saved to Incident, whereas Toronto (on the first row beneath the Location column) represents the object saved to the Incident object through the Location relationship.
- **Workflow State:** Displays the current [workflow state](#) of an object.
- **Roles:** Displays the user(s) who have been added to an object via the [role](#) field on a form.
- **Assessment Name/Workflow State:** Displays the name of a related assessment and its workflow state.

You can also apply **parameters** that use workflow states, formula ranges, select list options, or roles to filter what data is displayed on the table. Parameters can be applied using any of the relationships saved to the table's selected data definition.



You can create custom reports for the currently logged in user (e.g. My Incidents or My Risks) by applying the Current User parameter to the table. See step 14 below for more information.



If you need to use the [Data Import](#) feature to update existing objects, you can retrieve the objects' external reference IDs by adding the **External Reference ID** property to a table then reviewing the table in [view](#) .

Risk Category

Q Search Table...

Risk Category Name	Impact Trend	Likelihood Trend	Risk Trend
Fines			
Change in incoming work requests	Worse: 0	Worse: -1	Decreasing: -2
Change in supply	Worse: 0	Worse: 0	Decreasing: 0
Compliance with Legislation, Regulation, Administrative Agreement			
Product Delivery Delayed	Worse: -1	Worse: -1	Decreasing: -3
Lack of cashflow	Better: 2	Better: 2	Increasing: 12
Emerging Market Exposure	Better: 1	Worse: 0	Increasing: 2
Changing consumer confidence	Worse: -1	Better: 1	Increasing: 1
Material invoices are paid without shipment being verified	Worse: -2	Worse: 0	Decreasing: -8
Vendor payment is made for the incorrect amount	Worse: 0	Worse: 0	Decreasing: 0
Incorrect valuation of capital assets	Worse: 0	Worse: 0	Decreasing: 0
Product Pricing is not approved or validated in market	Worse: 0	Worse: 0	Decreasing: 0
Disclosures are not accurate	Worse: -2	Worse: -2	Decreasing: -10
Uncollectible debts not written off	Better: 2	Better: 1	Increasing: 8
Unjustified or unauthorized write-offs			
Personal data breach	Worse: 0	Worse: 0	Decreasing: 0
Problems with invoicing (delays, amounts)	Better: 2	Better: 2	Increasing: 8
Page 1 of 1 17 Rows			

A table as it's displayed in a view.

To add a table to a report:

1. In the Report Elements section, click the  icon beside Display.

Report Elements

Display

Free Form Text

Table

Pie Chart

Half-Pie Chart

Heat Map

Bar Chart

Column Chart

The Report Elements section. From here, you can add free form text, tables, charts, or heat maps.

2. Drag and drop **Table** from the **Report Elements** section to the **Report Canvas**.
3. Select a **data series** from the **Select a data series** dropdown menu, then click **Done**. The data definition selected here will determine which object types you can choose to display in your table.

ADD TABLE

Select a data series

Select a Data Definition

CANCEL

DONE

Selecting a data series.

4. Choose the data types you'd like to display in the table from the **Data Type** tab. Selecting **LIBRARY DATA** will include

object type data, while selecting an **Assessment Type** will include the assessment name and workflow state. By default, all data types are selected. To make individual selections, deselect the **Select All** checkbox, then click the data type(s) you wish to include.

Data series: Requirements, Controls*, Issues, Corrective Actions

Data Type

Columns

Parameters

SELECT YOUR DATA TYPE

☒ Select All

☒ LIBRARY DATA	LIBRARY
☒ Audit	ASSESSMENT TYPE
☒ Control Assessment	ASSESSMENT TYPE
☒ QCA	ASSESSMENT TYPE
☒ Quarterly Control Assessment	ASSESSMENT TYPE
☒ Risk Assessment	ASSESSMENT TYPE

The Data Type tab.

- Click the **Columns** tab.
- Choose either the anchor or an object type in the data path from the **Select a Relationship** dropdown menu. The options in this dropdown menu will vary depending on the definition selected as the data series in the step above.

Data series: Requirements, Controls*, Issues, Corrective Actions

Data Type

Columns

Parameters

SELECT A RELATIONSHIP

Anchor

Selecting which object type's data will appear in the table.

- Select the properties, workflow states, fields, formulas, relationships, and/or roles you want to display in the table from the **Select Data** section. Use the **Search** field to search for a particular data type, if needed.

SELECT DATA

Select the data you want to visualize in the table

✓ Name	PROPERTY
✓ Unique ID	PROPERTY
Description	PROPERTY
✓ External Reference Id	PROPERTY
Dimensions	PROPERTY
Objectives	OBJECTIVES WORKFLOW STATE
Date Created	OBJECTIVES DATE & TIME
Resources Required	OBJECTIVES PLAIN TEXT
Status	OBJECTIVES SELECT LIST
Business Unit	OBJECTIVES RELATIONSHIP
Key Performance Indicator	OBJECTIVES RELATIONSHIP
Key Results	OBJECTIVES RELATIONSHIP
Potential Audit Area	OBJECTIVES RELATIONSHIP
✓ Risks	OBJECTIVES RELATIONSHIP

The Select Data section.

- From the **Define Custom Forms** dropdown menu, select which form is displayed when a user clicks on data in the table. Choosing **Default** will display the form selected in the user's [role permissions](#) for the object type.

DEFINE CUSTOM FORMS

Choose which Custom Form will display when an object field is selected

Objectives

Default

The Define Custom Forms section.

9. **Optional:** In the **Sort Columns** section, click and drag the  icon next to the data types to rearrange how the columns will appear on the table.
10. **Optional:** If needed, click the  icon next to the data type to delete it from the table.
11. **Optional:** Select the **Show SUM totals for all numeric columns** checkbox to display a sum total of the numeric field values on the table.

SORT COLUMNS

Drag columns into the order you wish for them to appear on the table

Name		
RISK CATEGORY	INVERSE RISK CATEGORY	PROPERTY

| Impact Trend | | |
| **RISK CATEGORY** | INVERSE RISK CATEGORY | **RISK** FORMULA |

| Likelihood Trend | | |
| **RISK CATEGORY** | INVERSE RISK CATEGORY | **RISK** FORMULA |

| Risk Trend | | |
| **RISK CATEGORY** | INVERSE RISK CATEGORY | **RISK** FORMULA |

☐ Show SUM totals for all numeric columns

The Sort Columns section where you can rearrange the table columns or delete the data types.

12. Scroll to the top of the **Edit Table** screen, then click the **Parameters** tab.

Data series: Requirements, Controls*, Issues, Corrective Actions

Data Type	Columns	Parameters
-----------	---------	-------------------

SELECT A RELATIONSHIP

Anchor

▼

The Parameter tab.

13. Choose a relationship from the **Select a Relationship** dropdown menu. The relationship selected here will determine which parameters (filters) you can apply to the table to refine the data that's displayed. If needed, you can select a relationship that differs from the relationship selected in the **Columns** tab.
14. Under **Define Parameters**, select one or more of the following options to filter the data shown in the table:
 - [Workflow states](#) ;
 - [Select list](#) options;
 - [Formula](#) ranges (e.g. High, Medium, Low); or
 - By [Current User](#) . When one or more roles are selected in this parameter, only users within those roles can view the data in the table. This feature is useful to create customized reports for specific users. The available roles are determined by the object types in the table's [data series](#) .

By Risk: Workflow

Risk Analysis

×

Risk Treatment

×

Monitor Risk Within Tolerance

×

By Impact

Incidental

×

Minor

×

Moderate

×

Major

×

Extreme

×

By Likelihood

Select one...

By Current User (Risk)

Risk Owner

×

Multiple parameters in a table.

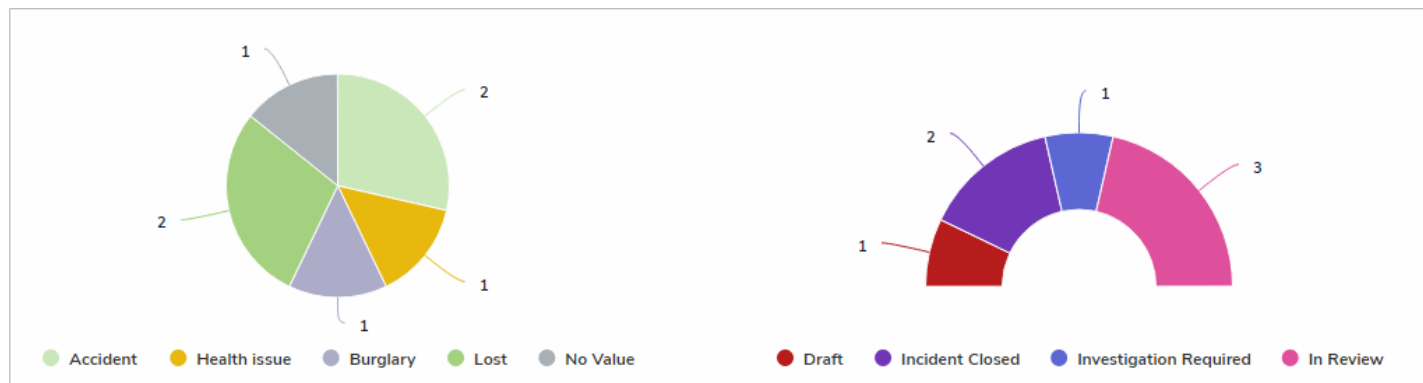


You can select multiple options as parameters. To remove a parameter, click the X icon next to the state or option.

15. Click **Done** to close the **Edit Table** screen.
16. Repeat the steps above to continue adding more tables to the report as needed. Once multiple elements are on the **Report Canvas**, you can rearrange them by hovering your cursor over the element, then clicking the  icon and dragging the element to a new location on the canvas. To delete an element, hover your cursor over it on the canvas, then click the  icon.

Add a Pie Chart or Half-Pie Chart to a Report

Pie charts display numeric data based on the data definition selected and can be displayed as a full pie chart or half-pie chart



A full pie chart and half-pie chart as they're displayed in a view.

The following data types are available to display in a pie chart:

- **Numeric:** Displays numeric field data. For example, a pie chart could display the number of hours spent investigating an Incident (anchor) object using data drawn from the Time Spent (Hrs) numeric field. Selecting numeric data will require that you choose an object type or relationship to represent the data in the **Group By** section of the pie chart settings.
- **Select List:** Displays the number of times a select list option appears on an object. For example, a pie chart could display the number of times options from the Incident Type select list (e.g. Accident, Violence, Health Issues, etc.) appears on the Incident objects associated with a Location (anchor) object.
- **Formula:** Displays the number of times formula ranges appear on an object. For example, a pie chart could display the number of times the Low, Medium, High, and No Value ranges from the Estimated Vehicle Damage formula appears on an Incident (anchor) object.
- **Relationship:** Displays the objects an anchor object is associated with through a relationship. For example, if the Employee Record object type is selected as an anchor and it appears on the Incident object type through a relationship, a pie chart could display the number of incidents the employee's name appears on. Selecting relationship data for a pie chart will require that you choose an object type or relationship to represent the data in the **Group By** section of the pie chart settings.
- **Workflow State:** Displays the workflow states and the number of objects that are associated with an anchor object. For example, a pie chart could display the number of Incident objects (and their current workflow states) that appear on a Location (anchor) object. If configured, [assessment](#) workflow states can be displayed in the chart.

To add a pie chart or half-pie chart to a report:

1. In the **Report Elements** section, click the  icon beside **Display**.

REPORT ELEMENTS

▼ Display

Free Form Text

Table

Pie Chart

Half-Pie Chart

Heat Map

Bar Chart

Column Chart

The Report Elements section. From here, you can add free form text, tables, charts, or heat maps.

2. Drag and drop **Pie Chart** or **Half-Pie Chart** from the **Report Elements** section to the **Report Canvas**.



Configurations for full pie and half-pie charts are identical. To change an existing full pie chart to a half-pie chart or vice versa, open the **Edit Pie Chart** palette and select **Pie** or **Half-Pie** in the **Configure Display** section.

3. Select a [data series](#) from the **Select a data series** dropdown menu, then click **Done**. The data definition selected here will determine which object types you can choose to display in your pie chart.

ADD PIE CHART

Select a data series

Select a Data Definition

CANCEL

DONE

Selecting a data series.

4. Choose the data types you'd like to display in the pie chart from the **Data Type** tab. Selecting **LIBRARY DATA** will include object type data, while selecting an **Assessment Type** will include the assessment name and workflow state. By default, all data types are selected. To make individual selections, deselect the **Select All** checkbox, then click the data type(s) you wish to include.

Data series: Requirements, Controls*, Issues, Corrective Actions

Data Type Columns Parameters

SELECT YOUR DATA TYPE ☒ Select All

☒ LIBRARY DATA	LIBRARY
☒ Audit	ASSESSMENT TYPE
☒ Control Assessment	ASSESSMENT TYPE
☒ QCA	ASSESSMENT TYPE
☒ Quarterly Control Assessment	ASSESSMENT TYPE
☒ Risk Assessment	ASSESSMENT TYPE

The Data Type tab.

5. Click the **Configure Your Chart** tab.
6. Choose the anchor or an object type in the data path from the **Select a Relationship** dropdown menu. The options in this dropdown menu will vary depending on the definition selected in the data series step above.

Data Type **Configure Your Chart**

SELECT A RELATIONSHIP

Anchor ▼

Selecting which object type's data will appear in the report.

7. From the **Select Data** section, select the data (numeric, select list, formula, relationship, or state) that you wish to display in the pie chart.

SELECT DATA

Select the data you want to visualize in the pie chart

✓ Risks	LOCATION	RELATIONSHIP
Controls	LOCATION	RELATIONSHIP
Location	LOCATION	WORKFLOW STATE

The Select Data section.

You may only select one data type to appear in the pie chart.

8. Select an object type or relationship from the **Group Data** dropdown menu. This selection will represent the legend on the pie chart and determine how the data is displayed.

GROUP DATA

Select the Object Type you would like to use to group the data. This selection will represent the legend.

Risks

Controls

RELATIONSHIP

Risks

RELATIONSHIP

Location

OBJECT TYPE

Control

OBJECT TYPE

Risk

OBJECT TYPE

The Group Data section of Edit Pie Chart palette. Your selection here will determine how the legend of the pie chart is displayed.

9. **Optional:** Enter a name for the chart in the **Chart Title** field.
10. **Optional:** To display the pie chart as a full chart or half-pie chart, select either **Pie** or **Half-Pie** in the **Configure Display** section.
11. Click **Done** when finished.

12. Repeat the steps above to continue adding more pie charts to the report as needed. Once multiple elements are on the **Report Canvas**, you can rearrange them by hovering your cursor over the element, then clicking the  icon and dragging the element to a new location on the canvas. To delete an element, hover your cursor over it, then click the  icon.

Add a Heat Map

The **Heat Map** uses colors and X and Y axes to display the intersection object data and where that object data falls on a scale. Heat maps are most commonly used when analyzing an organization's risks, the likelihood the risks will occur, and the impact on the organization should they occur.

EXAMPLE

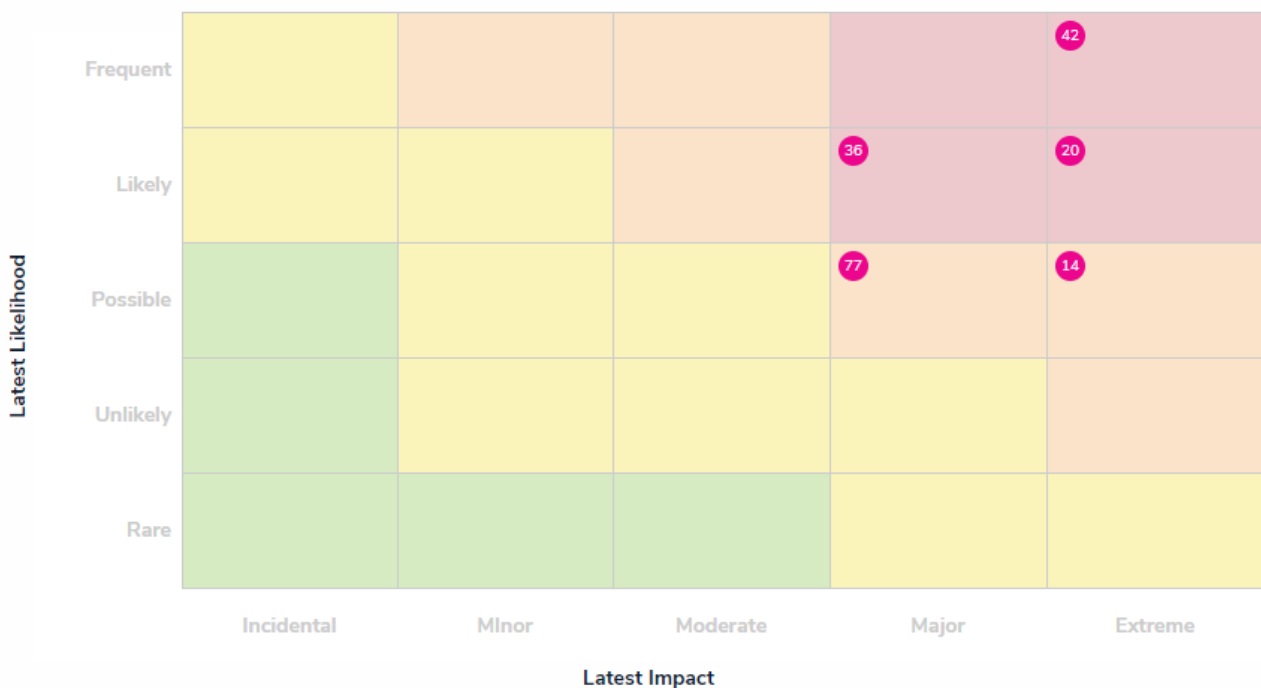
Your organization needs to track risks by each office location to implement the appropriate controls and tolerances. To do so, you create a heat map that uses the Business Unit object type as the report anchor, then select the Risk object type, which is associated with Business Unit through a relationship, through the Data Definition. This data definition will allow users to generate a report that will display all the risks at each location (Business Unit) as well as indicate the impact and likelihood of each risk on the heat map.

Objective based risk and assessment



PROVIDE OUTSTANDING CUSTOMER SERVICE

REPORT FOCUS



Search Table...

Risks Unique ID	Risks Name	Latest Impact	Latest Likelihood
R-77	Payroll Fraud	Major: 4	Possible: 3
R-42	Stress and fatigue	Extreme: 5	Frequent: 5
R-36	Supplier products/services are over dependent on one or two of their own suppliers	Major: 4	Likely: 4
R-20	Unsatisfactory level of support	Extreme: 5	Likely: 4
R-14	Changing consumer confidence	Extreme: 5	Possible: 3

Page 1 of 1 | 5 Rows

A heat map at the top of the report, as it appears to end users. The colored circles with numbers on the heat map represent the objects and their unique IDs. The bottom portion of the report is a table.

The labels on the left and bottom of the heat map (X and Y axis) are drawn from the object type's select list options or formula labels, while the circles on the heat map represent the objects, which display the object type monogram color, if any, and the number from the object's unique ID (e.g. R-4 will be displayed on the heat map as 4).

Clicking the objects on the map will display either the default form selected in the [role permissions](#) or an alternate form selected by an administrator in the report settings. Depending on the user's role permissions, the user may be able to view or edit the data in the form. Hovering your cursor over a circle on the heat map will display the object's full unique ID and name.

When a cell contains 10 objects or more, it will display **[No. of Objects] Items** instead of the number from the objects' unique IDs. Note that hovering your cursor over 10 or more objects will **not** display each objects' unique IDs and names, nor can you open individual objects when clicking on a cell with 10 or more.

It's recommended you create [a table](#) to accompany heat map reports, which



will allow users to open individual objects in cells that contain 10 objects or more, provide additional information about the objects, and allow the object data in the table to be exported into a Word document or Excel spreadsheet as needed. Heat map data cannot be exported

To add a heat map to a report

1. In the **Report Elements** section, click the  icon beside **Display**.

Report Elements

Display 

Free Form Text

Table

Pie Chart

Half-Pie Chart

Heat Map

Bar Chart

Column Chart

The Report Elements section. From here, you can add free form text, tables, charts, or heat maps.

2. Drag and drop **Heat Map** from the **Report Elements** section to the **Report Canvas**.
3. Select a [data series](#) from the **Select a data series** dropdown menu, then click **Done**. The data definition selected here will determine which object types you can choose to display in your pie chart.

ADD HEAT MAP

×

Select a data series

Select a Data Definition

CANCEL

DONE

Selecting a data series.

- Choose the data types you'd like to display in the heatmap from the **Data Type** tab. Selecting **LIBRARY DATA** will include object type data, while selecting an **Assessment Type** will include the assessment name and workflow state. By default, all data types are selected. To make individual selections, deselect the **Select All** checkbox, then click the data type(s) you wish to include.

Data series: Requirements, Controls*, Issues, Corrective Actions

Data Type

Columns

Parameters

SELECT YOUR DATA TYPE

☒ Select All

☒ LIBRARY DATA	LIBRARY
☒ Audit	ASSESSMENT TYPE
☒ Control Assessment	ASSESSMENT TYPE
☒ QCA	ASSESSMENT TYPE
☒ Quarterly Control Assessment	ASSESSMENT TYPE
☒ Risk Assessment	ASSESSMENT TYPE

The Data Type tab.

- Click the **Configure Your Chart** tab.
- Choose either the anchor or an object type in the data path from the **Select a Relationship** dropdown menu. The options in this dropdown menu will vary depending on the definition selected as the data series in the step above.

Data Type

Configure Your Chart

SELECT A RELATIONSHIP

Anchor

Selecting which object type's data will appear in the heatmap.

7. Choose the select list or formula saved to the object type that will appear in the X-axis (bottom) and Y-axis (left) axes on the report.

SELECT AXES

Select the data you want to visualize in the table

X-Axis

Likelihood

Y-Axis

Impact

Choosing which select list or formula labels will appear on the report.

8. Click **Regenerate Heat Map** in the **Configure Colors** section to show a preview of the heat map.

CONFIGURE COLORS

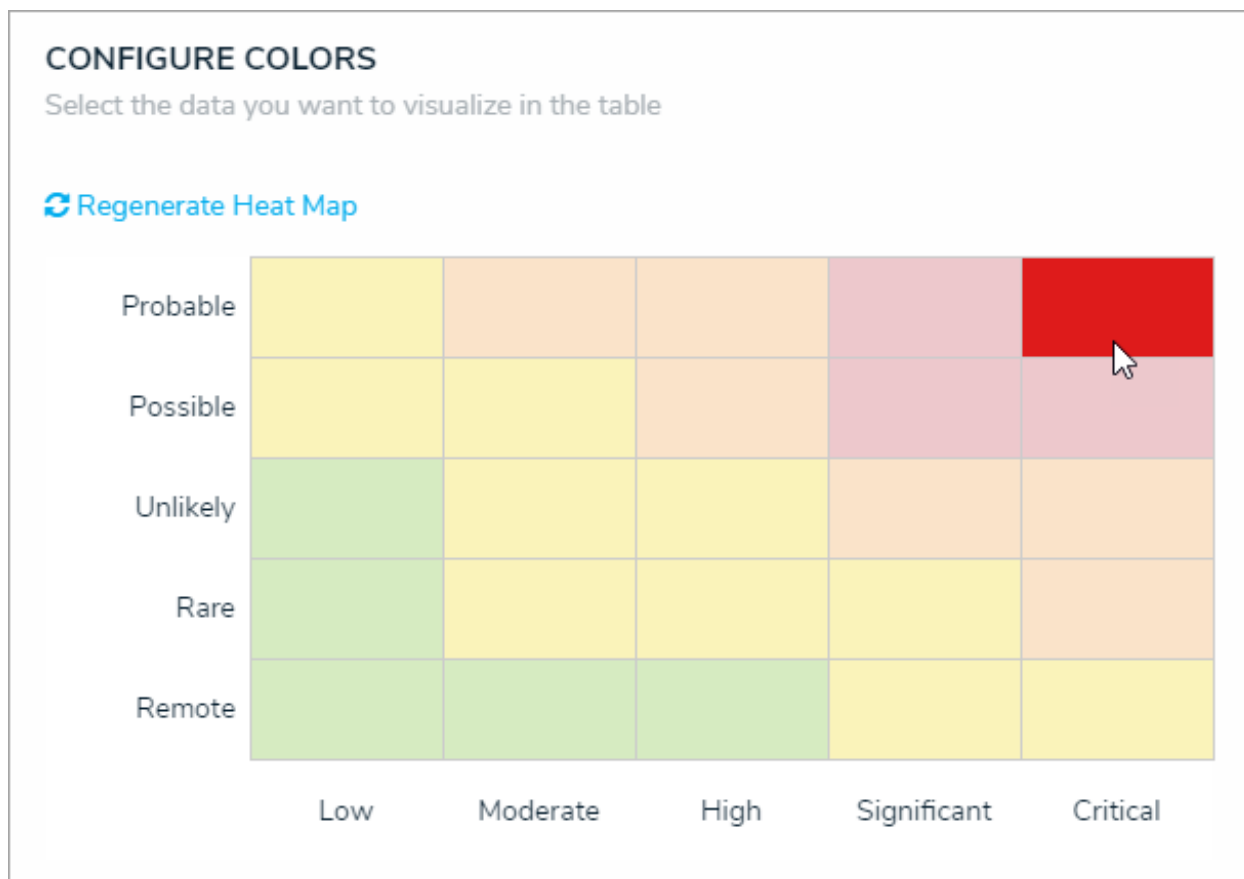
Select the data you want to visualize in the table

 **Regenerate Heat Map**

Probable					
Possible					
Unlikely					
Rare					
Remote					
	Low	Moderate	High	Significant	Critical

A preview of the heat map. Clicking Regenerate Heat Map will display the colors on the map for adjustment as needed.

9. Click each cell to adjust the colors and shades as needed. Available colors range from light to dark shades of green, yellow, orange, and red.



Clicking a cell in the report preview allows you to adjust the color of each cell.

- In the **Scale Labels** section, select either **Field and Label Names** to display the name of the select list or formula along with their options/labels on the heat map or **Label Names Only** to display the options or formula labels only.
- In the **Object Labels** section, select the **Unique ID (has decimals)** option if you want to display the decimals of any assessment instances (e.g. 32.1). Select **Library ID** if you do not want decimals displayed (e.g. 32).

CONFIGURE DISPLAY

Scale Labels

☐ Field and Label Names ☒ Label Names Only

Object labels

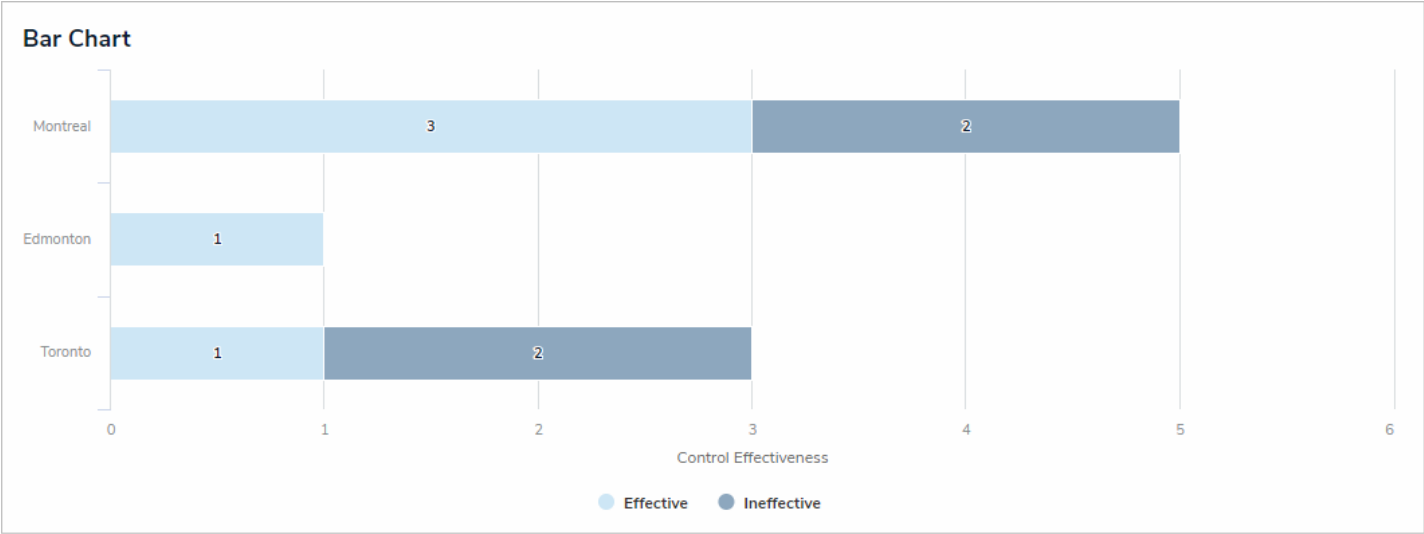
☐ Unique ID (has decimals) ☒ Library ID

The Configure Display section.

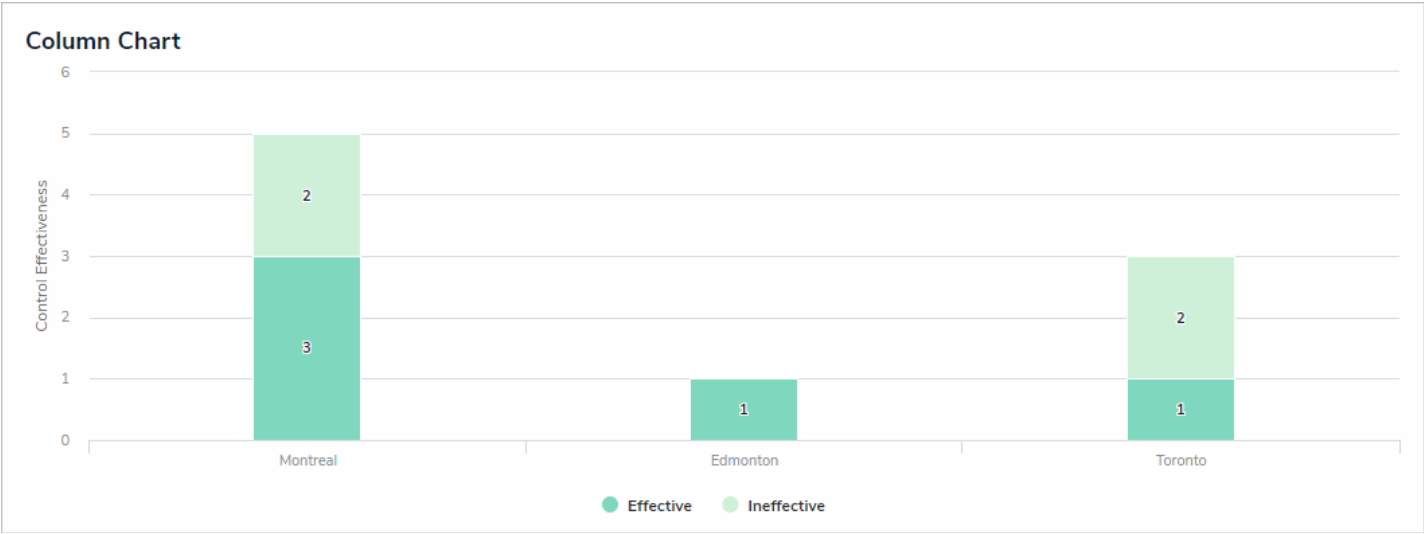
- From the **Define Custom Forms** dropdown menu, select which form is displayed when a user clicks on data in the heat map. These options are determined by the object type selected in the **Select a Relationship** dropdown menu above. Choosing **Default** will display the form selected in the user's [role permissions](#) for the object type.
- Click **Done** when finished.

Add a Bar Chart or Column Chart

Bar charts and column charts display numeric data based on the data definition selected.



A bar chart with grouped data.

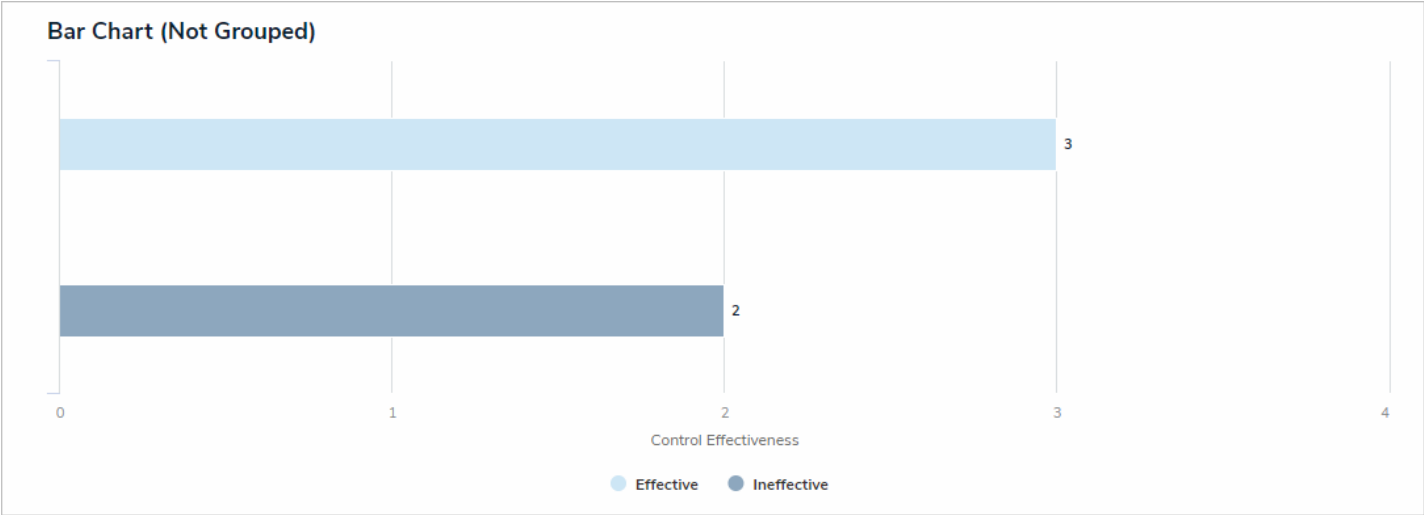


A column chart with grouped data.

Group By

When creating a bar or column chart, you can choose if the data is grouped by an object type or relationship. For example, in the screenshots above, the reports are displaying the number of times the Effective and Ineffective select list options appear on the Incident objects where each location has been referenced (e.g. the Montreal object has been selected on five Incident objects. Three of those Incident objects were effective, while two were ineffective).

When a chart **isn't** grouped, the number of times the selected field, formula, relationship, or state appears on a single object is totalled on the chart. For example, in the screenshots below, the data has not been grouped and the charts are therefore displaying the number of times the Effective and Ineffective select list options appear on the Incident objects at the Montreal location.



An ungrouped bar chart.



An ungrouped column chart.

To add a bar chart or column chart to a report:

1. In the **Report Elements** section, click the  icon beside **Display**.

REPORT ELEMENTS

▼ Display

Free Form Text

Table

Pie Chart

Half-Pie Chart

Heat Map

Bar Chart

Column Chart

The Report Elements section. From here, you can add free form text, tables, charts, or heat maps.

2. Drag and drop **Bar Chart** or **Column Chart** from the **Report Elements** section to the **Report Canvas**.



Configurations for bar and column charts are identical. To change an existing bar chart to a column chart or vice versa, open the **Edit Chart** palette and select **Bar** or **Column** in the **Configure Display** section.

3. Select a [data series](#) from the **Select a data series** dropdown menu, then click **Done**. The data definition selected here will determine which object types you can choose to display in the chart.

ADD BAR CHART

Select a data series

Select a Data Definition

▼

CANCEL

DONE

Selecting a data series.

4. Choose the data types you'd like to display in the pie chart from the **Data Type** tab. Selecting **LIBRARY DATA** will include object type data, while selecting an **Assessment Type** will include the assessment name and workflow state. By default, all data types are selected. To make individual selections, deselect the **Select All** checkbox, then click the data type(s) you wish to include.

Data series: Requirements, Controls*, Issues, Corrective Actions

Data Type Columns Parameters

SELECT YOUR DATA TYPE ☒ Select All

☒ LIBRARY DATA	LIBRARY
☒ Audit	ASSESSMENT TYPE
☒ Control Assessment	ASSESSMENT TYPE
☒ QCA	ASSESSMENT TYPE
☒ Quarterly Control Assessment	ASSESSMENT TYPE
☒ Risk Assessment	ASSESSMENT TYPE

The Data Type tab.

5. Click the **Configure Your Chart** tab.
6. Choose the anchor or an object type in the data path from the **Select a Relationship** dropdown menu. The options in this dropdown menu will vary depending on the definition selected in the data series step above.

Data Type **Configure Your Chart**

SELECT A RELATIONSHIP

Anchor

Selecting which object type's data will appear in the report.

7. From the **Select Data** section, select the data (numeric field, select list field, formula, relationship, or state) that you wish to display in the chart.

SELECT DATA

Select the data you want to visualize in the bar chart.

Search...		
✓ Control Effectiveness	CONTROL	SELECT LIST
Operating Effectiveness	CONTROL	SELECT LIST
Design Effectiveness	CONTROL	SELECT LIST
Control Self Assessment	CONTROL	SELECT LIST
Conflicting Duties exist?	CONTROL	SELECT LIST
Control Source	CONTROL	SELECT LIST
Dependent on IT?	CONTROL	SELECT LIST
Key Control	CONTROL	SELECT LIST
Preventative or Detective	CONTROL	SELECT LIST
Frequency	CONTROL	SELECT LIST
Inherent Risk	CONTROL	FORMULA
No Labels	CONTROL	FORMULA
Control	CONTROL	WORKFLOW STATE

The Select Data section.



You may only select one data type to appear in the bar chart.

8. **Optional:** Select an object type or relationship from the **Group Data** dropdown menu. This selection will determine the legend to the left of the chart and the category of the data displayed. If the data is not grouped, a total count of the field, formula, or state selected in step 5 above will be displayed.

GROUP DATA

Select the Object Type or Relationship you would like to use to group the data.

Select one... ▾

Issue	RELATIONSHIP
Control	OBJECT TYPE
Issue	OBJECT TYPE

The Group Data section of Edit Chart palette. Your selection here will determine how the legend of the chart is displayed.

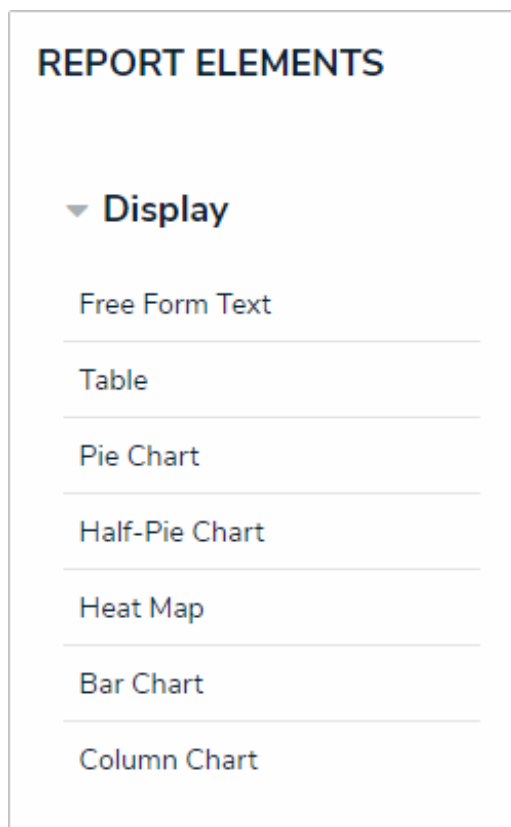
9. **Optional:** Enter a name for the chart in the **Chart Title** field.
10. **Optional:** To display the chart as bars or columns, select either **Bar** or **Column** in the **Configure Display** section.
11. **Optional:** If the data is grouped (see step 6), select the **Column Totals** checkbox to display a total count of the grouped data in each bar or column. If the data is not grouped, this option will be grayed out.
12. Click **Done** when finished.
13. Repeat the steps above to continue adding more bar or column charts to the report as needed. Once multiple elements are on the **Report Canvas**, you can rearrange them by hovering your cursor over the element, then clicking the  icon and dragging the element to a new location on the canvas. To delete an element, hover your cursor over it, then click the  icon.

Add Free Form Text to a Report

You can use free form text on a report to label the pie charts or tables or provide any additional information, as required.

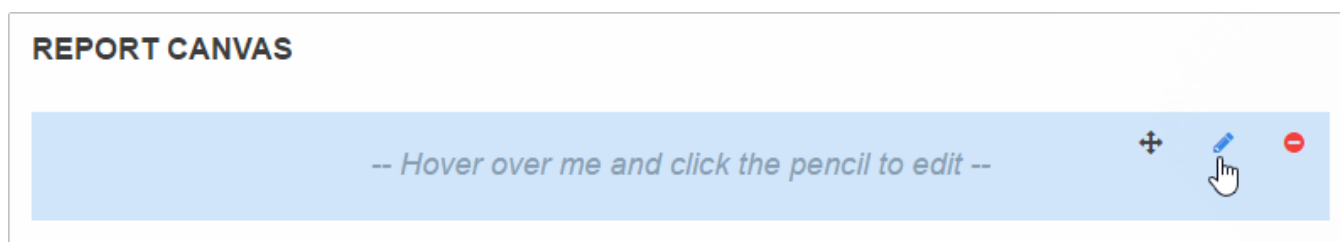
To add free form text to a report:

1. In the **Report Elements** section, click the icon beside **Display** to show the report elements.



The Report Elements section. From here, you can add free form text, tables, charts, or heat maps.

2. Drag and drop **Free Form Text** from the **Report Elements** section to the **Report Canvas**.
3. On the **Report Canvas**, hover your cursor over the free form text element, then click the  icon to open the **Edit Free Form Text** screen.



Clicking the pencil icon to edit the free form text element.

4. Enter the text in the **Content** field.

5. **Optional:** Apply [Markdown](#) formatting to the text. To view popular formatting styles, click the  icon next to **Basic Markdown Formatting**.

EDIT FREE FORM TEXT

Content

Incidents by Location

Basic Markdown Formatting

HEADERS

h1

h2

h3

h4

EMPHASIS

italic

****bold****

~~---strikethrough---~~

LISTS

Unordered

-Item 1

-Item 2

-Item 3

Ordered

1. Red

2.

Green

3. Blue

LINKS

inline link

[Display text]

([http\(s\)://www.link.com](http(s)://www.link.com))

inline link with text

[Display text]

([http\(s\)://www.link.com](http(s)://www.link.com) "Link Homepage")

images

![alt text]

([http\(s\)://www.image.com](http(s)://www.image.com))

DONE

Free form text styled with Markdown formatting.

6. Click **Done** when finished.

7. Repeat the steps above to continue adding more free form text elements to the report as needed. Once multiple elements are on the **Report Canvas**, you can rearrange them by hovering your cursor over the element, then clicking the  icon and dragging the element to a new location on the canvas. To delete an element, hover your cursor over it, then click the  icon.

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Edit or Delete a Report



At this time, you cannot edit or remove the data definitions saved to a report without deleting the report and then recreating it, however, edit functionality for data definitions is scheduled for an upcoming release in the near future.

To edit or delete a report:

1. Click the  icon in the top bar > **Object Types** in the **Data Model** section.
2. Click the report you want to edit or enter the name of the report in the **Search** field, then click it to show the **Edit Report** page.
3. To edit the report's name or description, click the  icon to the right of the report's name, then make your changes as needed in the **Name** and **Description** fields.
4. To add or remove filters, click **Configure Filters** in the **Filters** field, then click the fields, relationships, or formulas to add or remove them as a filter.
5. To edit the free form text element, table, or pie chart, hover your cursor over the element, click the  icon, make your changes, then click **Done** when finished.
6. To rearrange how the report elements will appear in a view and their order on the report canvas, hover your cursor over an element, click the  icon and drag the element to a new location on the canvas.
7. To delete a report element, hover your cursor over the element, click the  icon, then click **Yes** to confirm.
8. To delete the report, click the  icon at the bottom of the **Edit Report** page, then click **Yes** to confirm.



Deleting a report will also delete the filters and elements added to it.

Data Analytics Export Overview

Data Analytics Export reports are specifically designed to allow end users to export object data (properties, fields, workflow states, relationships, and references) into an Excel spreadsheet. Although a data analytics report requires a [data definition](#) , this report type does not display any report elements. Export reports can be accessed by end users through:

- An activity [view](#) ;
- An activity [action](#) ; or
- An [Export Data](#) form action.

As with other reports, a data analytics report requires a [report focus eligible definition](#) to filter object type data; however, when generating this report, a specific **anchor object** (not to be confused with **anchor object type**) must be selected, either through a view, action, or form action, to specify which object's data is exported, including any data from relationship or reference object types selected in the data path. If the anchor object isn't named on any relationship or reference objects, the report will export anchor object data only.

Once the report is created, users can export data through an activity [view](#) or [action](#) or the [Export Data action](#) to a configurable form.

EXAMPLE

Using a data definition with Location as the anchor object type and Incident as a reference object type, a data analytics report is created and added to a view so that users can click on a specific location object, then export its data into a spreadsheet. Specifically, when a user clicks on the Montreal object in the Location Data Export view on an activity, they'll be able to export the data from that object's properties, fields, and workflow states, along with the data of all the incident objects Montreal has been added to through a relationship.

Location Data Export

ANALYTICS EXPORT

This tool is used to export all data defined by the below parameters into an Excel format that can be consumed by third-party analytics tools. Note: permissions are applied on export.

EXPORT DETAILS

Report Name: Location Data Export

Report Focus:

Location > Incident

Anchor Object: Montreal

CANCEL

 EXPORT TO EXCEL

A data analytics report in a view. Clicking the Export to Excel button will initiate download of the spreadsheet.

AutoSave On Analytics.Export.Report.1790.Object.73.Oct.04.2017.2.33.PM.UTC.xlsx - Excel

File Home Insert Page Layout Formulas Data Review View Tell me what you want to do Share

Paste Verdana 12 A A B I U Font Alignment Number Styles Conditional Formatting Insert Delete Format Sort & Find & Filter Select Share Upload Editing Box

BO22

	A	B	C	D	E	F	G	H	I	J	K	L	
1	Id	Object Type	Object Type	Workflow	Workflow	Name	Descriptor	Unique	Created (U	Created By	Created By	Created By	Mod
2	73	1857	Location	8050	Default	Montreal		1	2016-11-16	1212	Eva Luckett	evaluckett@201	
3	73	1857	Location	8050	Default	Montreal		1	2016-11-16	1212	Eva Luckett	evaluckett@201	
4	73	1857	Location	8050	Default	Montreal		1	2016-11-16	1212	Eva Luckett	evaluckett@201	
5													
6													
7													
8													
9													
10													
11													
12													
13													
14													
15													
16													
17													
18													
19													
20													
21													
22													

Sheet1

Ready 100%

Object data exported into a spreadsheet through a data analytics report.

Create a Data Analytics Export Report

To create a Data Analytics report:

- 1. Ensure the data definition you wish to use for the data analytics report has been created from the [Data Definitions](#) settings in **Administration**.
- 2. Click the  icon in the top bar > **Reports** in the **Views** section.
- 3. Click **Create Report**.
- 4. Enter the name of the report in the **Name** field.
- 5. **Optional:** Enter a description of the report. This description will appear below the report's name on the **Reports** page.
- 6. Select **Data Analytics Export** from the **Type** dropdown menu.
- 7. Select a [report focus](#) from the **Report Focus** dropdown menu. For example, if you wish to create a report that will allow users to export Location data, you would select a report focus with the Location object type as the anchor.

Admin : Create Report

Name

Location Data Export

Description

Type

Data Analytics Export

Report Focus

Location Only

CANCEL

✓ CREATE

The Create Report page.

- 8. Click **Create** to display the **Edit Report** page. From here, you can edit the name of the report, however, if you wish to change the report focus, you'll need to delete the report and recreate it.

Admin

Edit Report

LOCATION DATA EXPORT



Report focus: Location Only

Anchor: Location

Data: Location



 DONE

The Edit Report page for a Data Analytics Export report.

Once the export report has been created, you can grant end users access to it by adding it to a [view](#) , [action](#) , or [Export Data](#) form action.

Export Object Data (Data Analytics Report)

Once a data export report has been created, it can be generated by end users through:

- An activity [view](#) ;
- An activity [action](#) ; or
- An [Export Data](#) form action.



If the exported object has a file attachment field, only the number of files attached will be exported into the spreadsheet. If the object contains an image attachment field, it will display only a 0 (for no image attached) or a 1 (one image attached) as only one image can be attached per image attachment field.

Location Data Export

ANALYTICS EXPORT

This tool is used to export all data defined by the below parameters into an Excel format that can be consumed by third-party analytics tools. Note: permissions are applied on export.

EXPORT DETAILS

Report Name: Location Data Export

Report Focus:

Location > Incident

Anchor Object: Montreal

CANCEL

EXPORT TO EXCEL

A data analytics report as it's displayed to end users after clicking an object in a view or clicking the Export Data form action button on the object.

AutoSave Off Analytics.Export.Report.1790.Object.73.Oct.04.2017.2.33.PM.UTC.xlsx - Excel

File Home Insert Page Layout Formulas Data Review View Tell me what you want to do Share

Clipboard Font Alignment Number Styles Cells Editing Box

BO22

	A	B	C	D	E	F	G	H	I	J	K	L	
1	Id	Object Type	Object Type	Workflow	Workflow	Name	Descript	Unique	Created (U	Created By	Created By	Created By	Mod
2	73	1857	Location	8050	Default	Montreal		1	2016-11-16	1212	Eva Luckett	evaluckett@201	
3	73	1857	Location	8050	Default	Montreal		1	2016-11-16	1212	Eva Luckett	evaluckett@201	
4	73	1857	Location	8050	Default	Montreal		1	2016-11-16	1212	Eva Luckett	evaluckett@201	
5													
6													
7													
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11													
12													
13													
14													
15													
16													
17													
18													
19													
20													
21													
22													

Sheet1

Ready 100%

An analytics report for the Location object.

Activity View

To export object data through a Data Export view in an activity, open the activity from the left navigation menu, click an object in the view to display the report page, then click **Export to Excel** to automatically download the report through your browser.

EXPORT LOCATION DATA

L-1

Montreal



Default

L-2

Los Angeles

Default

L-3

New York

Default

L-4

Edmonton

Default

L-5

Toronto

Default

Form Action

To export object data using the Export Data form action, open the object, click the customized button on the configurable form to display the report page, then click **Export To Excel** to automatically download the report through your browser.

Location Review

Montreal

L-1

Location Name

Montreal

Incidents at this location

HP/Accident 2016/9/21



SB/Accident 2016/09/14



KD/Lost 2016/04/02



Address

123 Street Avenue
Montreal, QB, 1A1 A1A

EXPORT LOCATION DATA

An object with the Export Data form action. In this case, clicking the Export Location Data button will display the export report page for the Montreal object.

Activity Action

To export object data through an action, open the activity from the left navigation menu, click the action button to display the report page, select an object from the **Anchor Object** dropdown menu, then click **Export to Excel** to automatically download the report through your browser. The objects that appear in the dropdown menu are determined by the report's [data definition](#) and your [role's permissions](#).

DATA ANALYTICS REPORTS



EXPORT LOCATION DATA

A Export Data form action button in an activity.

Location Data Export

ANALYTICS EXPORT

This tool is used to export all data defined by the below parameters into an Excel format that can be consumed by third-party analytics tools. Note: permissions are applied on export.

EXPORT DETAILS

Report Name: Location Data Export

Report Focus:

Location > Incident

Anchor Object

Search...

L-6 Edmonton

L-7 Montreal

L-5.1 New York

L-9 Toronto

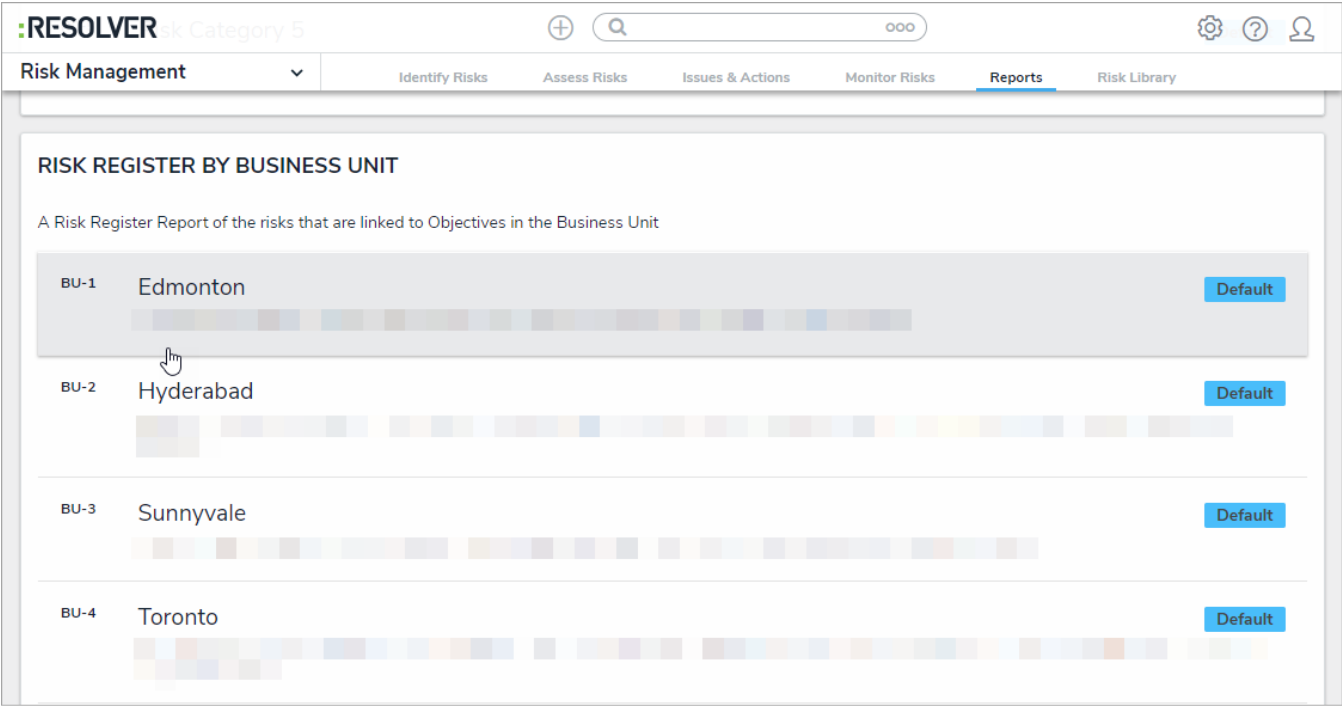
Selecting an anchor object in an export data action in an activity.

View a Report

Before a report can be viewed, an administrator must first [create it](#) and add it to a [view](#) in an application. The data you can view in a report depend on your role's [permissions](#) and the report's configurations in the administrative settings.

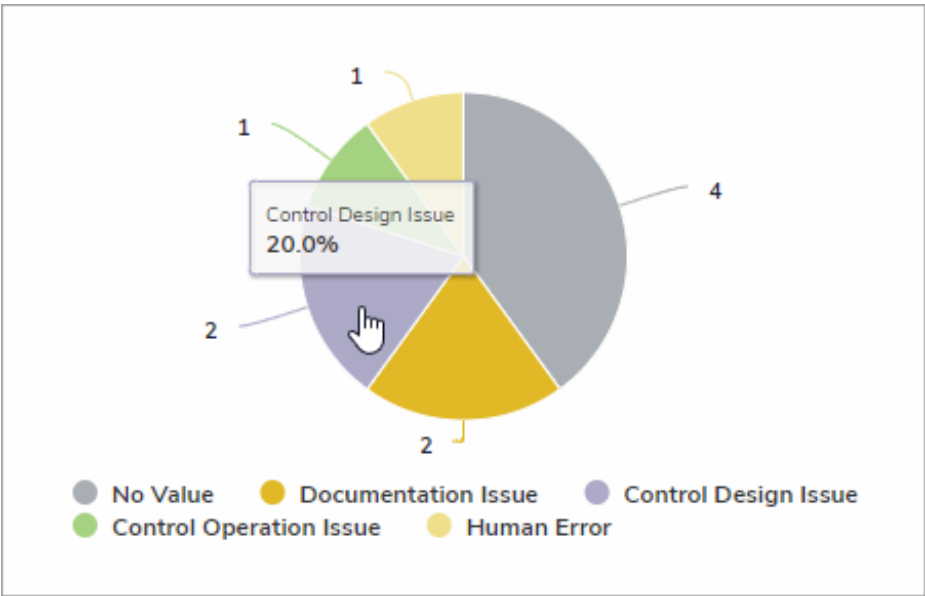
To view a report:

- 1. Navigate to the application and activity where the report is saved.
- 2. Click an [anchor \(root\) object](#) in the view to open the report.



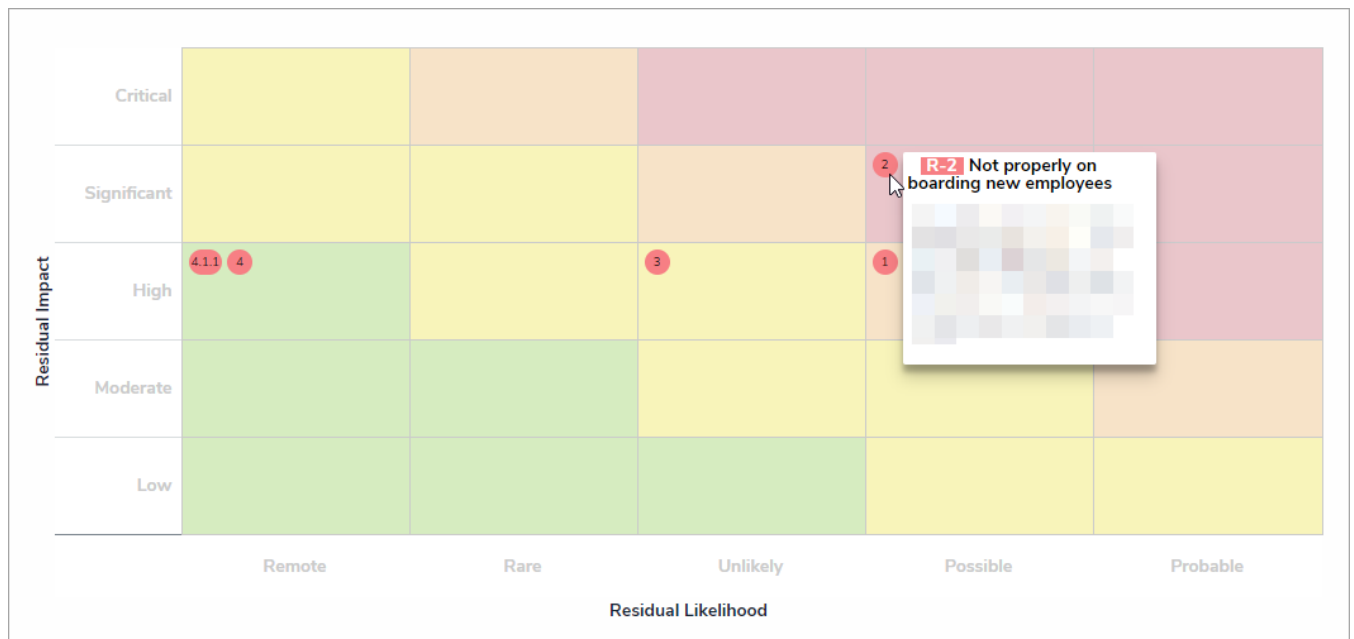
Clicking on an anchor object to open a report.

- 3. If the report includes a bar, column, or pie chart, hover your cursor over the chart for more information about the data. Clicking on a section of a pie chart will separate it from the rest of the chart for emphasis.



Hovering your cursor over bar, column, or bar chart will display additional information.

4. If the report includes a heat map, hover your cursor over the objects on the heat map (represented by circles and identified by their unique IDs) to display the object's description. Click the object view and/or edit it in a palette.



Hovering your cursor over an object in a heatmap will display the object's description while clicking the object will open it in a palette.

5. If the report includes a table:
- Click a cell to open the associated object in a palette.
 - Click a column to sort the data in the table.
 - Click **Next** or **Previous** at the bottom of the table to scroll through any additional pages.
 - Enter search terms in the **Search Table...** field to narrow down which data is displayed.
 - Click the  icon to export the table data into a Word document or click the  icon to export the table data into an Excel spreadsheet.

2017 Audits							
				Search Table...			
Audits Name	Audit state	Audit Scope	Estimated Timing ▲	Audit Budget Hours	Internal Auditor	Audit Client	
Procurement Audit	Reporting	The audit scope defines what part of the organization will be audited. If the full audit is divided in smaller segments then the scope of any given segment is what portion of the organization will be audited at that time. Typically, Internal Audit prepares and Audit Plan for the year which will indicate the various divisions or activity and when it will be audited. Also noted in the audit program is the audit objective(s). The audit objective describes why an audit is being conducted. Another reason is demonstrate conformance to others. Although audits may appear in their own right to be "good practice", it is essential that auditors have a clear concept of what the general objectives of such audits are.	Q1 2017				
AML Compliance Audit	Closed	Determine the effectiveness of AML controls throughout the organization.	Q1 2017				
New system integration audit 12	Reporting	In order to give assurance that the Department/agency operates effectively, it is essential to carry out some form of monitoring activity in addition to ongoing monitoring and measurement. Listed below are some of the potential benefits of Internal Auditing:	Q1 2017				
Mortgages Audit	Planning	The auditor will start by reviewing your approval criteria for new mortgages to ensure that none of your practices are discriminatory and the risk level is appropriate. He will typically make a list of the minimum requirements for credit, income, appraisal value, debt-to-income ratio and any other key metrics your company uses for evaluation. This will be used as a reference for reviewing individual loan applications later in the audit.	Q3 2017	40			

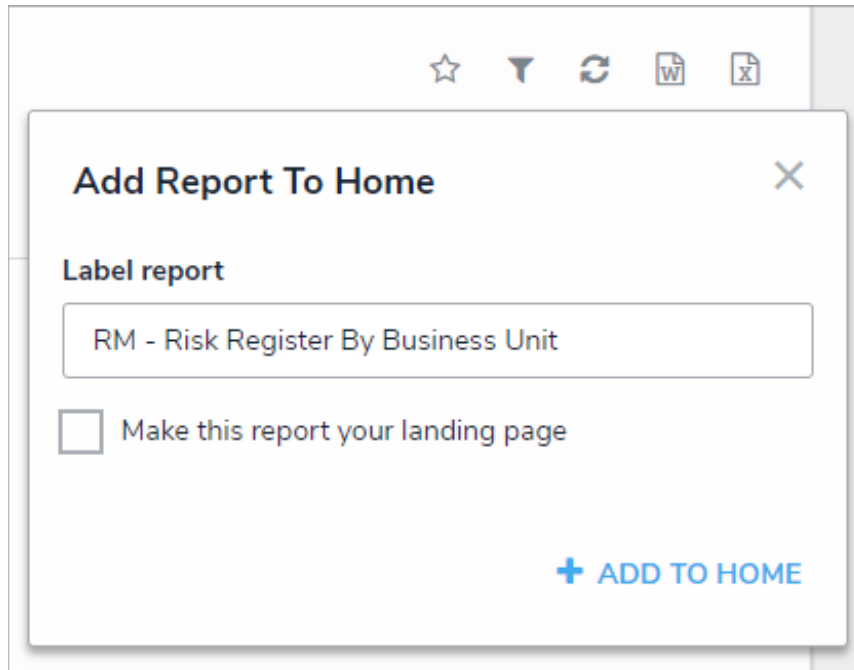
Clicking on a cell in a table will display the associated object in a palette, while clicking on a column header will sort the data in the table.



Only table data can be exported into a Word document or Excel spreadsheet. If you export data from a report that also contains a chart or heat map, that data will not appear in the document or spreadsheet.

6. To star a report (create a tab for the report in the **nav bar**):

- Click the icon at the top-right corner of the report to open the **Add Report To Home** window.
- If needed, enter a custom name for the tab in the **Label report** field. The report's name, as saved by an administrator, appears in this field by default.



The Add Report To Home window.

- c. Select the **Make this report your landing page** checkbox if you want this report to replace the [My Tasks](#) tab or another report tab as the home page. To revert back the home page back to **My Tasks**, deselect the checkbox.
- d. Click **Add To Home** to finish.
- e. To delete the tab from the nav bar, click the  icon, then click **Remove From Home**.



For more information on reports added to tabs, see the [Starred Reports](#) article.

7. To apply [filters](#) to a report (if configured by an administrator):

- a. Click the  icon at the top-right corner of the report to open the **Filters** palette. When a report is displayed with filters applied, the filter icon will appear with a red dot ().
- b. Apply the following filters types as needed. Note that some or all of these sections may be blank if these filter types have not been added to report by an administrator:
 - **State:** Filters the report data by the objects' current [workflow state\(s\)](#) .
 - **Role:** Filters report data by users or user groups in explicit [roles](#) that have explicit that have been granted direct access to objects from the report's [data definition](#) .
 - **Date & Time/Select List:** Filters the report data by [date and time](#) and/or [select list](#) fields.
 - **Formula:** Filters the report data by [formula](#) label(s).
 - **Relationship:** Displays report data from one or more selected [relationship](#) object types and any related [reference](#) object types. For example, selecting the Risk 1 object type in this filter will also display all the Control objects that Risk 1 appears on through a relationship.
 - **Object Type:** Displays report data from one or more selected object types.

FILTERS

STATES

Issue

Select one...

Risk

Select one...

Risk - Risk Assessment Risk Workflow

Select one...

Risk - Quarterly Control Assessment Risk Workflow

Select one...

ROLES

Risk: Risk Owner

Start typing to find Us...

Control: Control Owner

Start typing to find Us...

RELATIONSHIPS

Risk Categories with Risk Sub Categories

Q

Risk Sub Categories with Risks

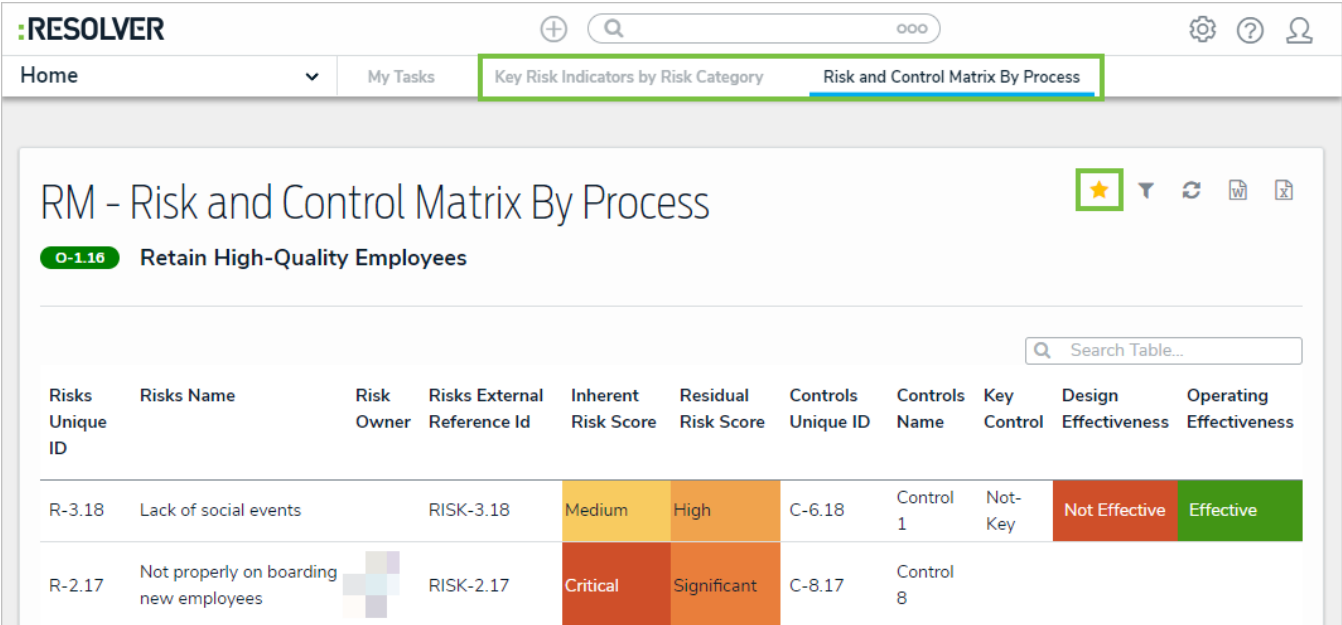
The Filters palette. If an administrator has not added filters, these sections will appear blank.

8. To refresh report data, click the  icon.

Starred Reports

When a report is starred, it appears as a tab in the **nav bar** beside **My Tasks** . These tabs are displayed when working in the **Home** area of your organization after:

- Logging in;
- Clicking the company logo in the top-left corner of any page; or
- Clicking **Home** from the nav bar dropdown menu.



Starred reports displayed as tabs in the nav bar.

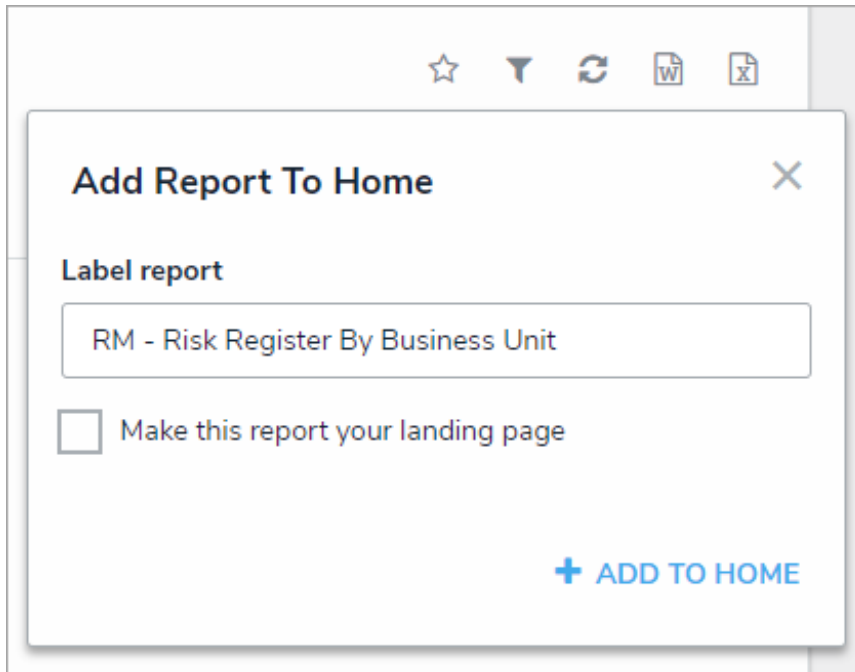
The **My Tasks** tab is the default landing page when viewing the **Home** area of your organization, but a starred report can be marked as the landing page so that its tab is automatically opened when returning to **Home**.



Starred report data is not updated in real time. If the data changes while the report tab is open, click the  icon to refresh.

To star a report:

1. **Open** the report you want to star.
2. Click the  icon at the top-right corner of the report to open the **Add Report To Home** window.
3. If needed, enter a custom name for the tab in the **Label report** field. The report's name, as saved by the administrator who configured it, appears in this field by default.



The Add Report To Home window.

4. Select the **Make this report your landing page** if you want this report to replace the [My Tasks](#) tab or another starred report as the home page. To revert back the home page back to **My Tasks**, deselect the checkbox.
5. Click **Add To Home** to finish.
6. Repeat 1-6 above to continue adding more reports as needed. The tabs appear in the nav bar based on the order they were starred. Additional tabs that span beyond the view of the nav bar in your browser can be accessed by clicking the  icon.
7. To delete the tab from the nav bar, click the  icon, then click **Remove From Home**.

Personalized Reports

Both administrators and end users can create a more personalized experience in their organization using one or more of the following report features:

- **Role Filters:** End users can filter report data by user group and/or specific users within a role that was previously selected by an administrator. This allows end users to focus on data that's relevant to them.
- **Role Parameters:** Administrators can apply parameters to control which data is displayed in the report and all its [elements](#).
- **Table Parameters:** Administrators can apply a role parameter to a table element so that only users within the selected role(s) can view the data in the table.
- **Starred Reports:** End users can star a report so that it appears as a tab in the [nav bar](#) when working in the **Home** area of their organization. Starred reports can also be flagged as the user's landing page so that it's displayed on login, after clicking the company logo in the top-left of the page, or selecting **Home** from the nav bar dropdown menu.

For information on these features, see the following articles:

- [Add Filters to a Report](#)
- [Add Parameters to a Report](#)
- [Add a Table to a Report](#)
- [Starred Reports](#)

Users Overview

Every person accessing the Core system must have his or her own username and password to log in. User accounts are then added to [User Groups](#) and [Roles](#) , so that you can define which users can view, edit, create, and manage certain elements and objects.

The **Users** settings is also where you can [impersonate](#) other non-admin users, enable or disable accounts, administrative rights, or the [All Access](#) settings, or select which [language](#) the user will see in the UI and applications if they haven't selected a default language in their browser.

All Access Settings

Enabling the **All Access** settings in a user's profile grants the user access to all object types and their objects in the organization. This means that a user with these settings enabled can view all objects **without** an administrator adding the user to a [role](#), adding one or more object types to the role, then configuring the [workflow permissions](#).

Note that even if a user has been added to a role, any workflow permissions configured for the object types are overridden by the All Access settings. Additionally, should the user need access to an application and its activities, the user must be added to a role, which then must be added to an [activity](#). If the user should be an administrator, you must enable the **Admin** settings in their user profile.

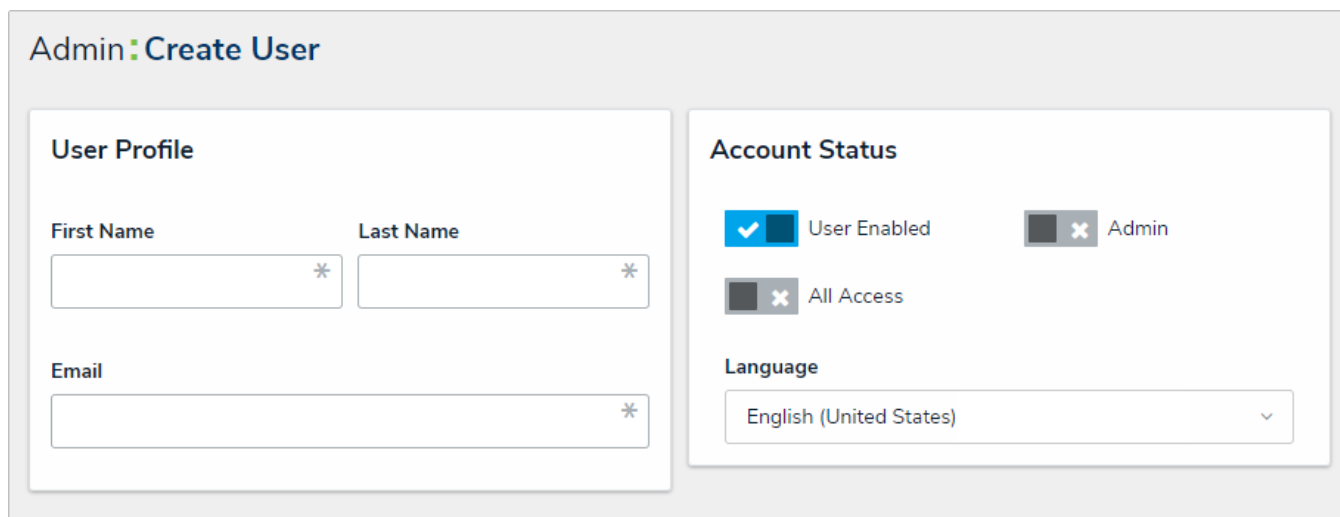


Because **All Access** grants a user access to all objects types and their objects within an organization, it's recommended that you enable these settings only when necessary.

Create a New User

To create a new user:

1. Click the  icon in the top bar > **Users** in the **People** section.
2. Click **Create User** to show the **Create User** page.



The Create User page.

3. Enter the user's name in the **First Name** and **Last Name** fields.
4. Enter the user's email address in the **Email** field. This is the address that will receive the email with further instructions on creating a password to sign into CORE. This email address is also used to authenticate the user when he or she logs in and therefore must be unique.



Because the user's email address is used to authenticate the user when he or she logs in, ensure the email address is correct before clicking **Create** as you will be unable to modify the address later.

5. **Optional:** Click the  icon next to **User Enabled** to make this user account inactive. By default, the user account is active.
6. **Optional:** Click the  icon next to **Admin** to make this user an administrator. By default, administrative rights are disabled.
7. **Optional:** Click the  icon next to **All Access** to allow this user to access all the object types and their objects within the organization.



All Access allows grants a user access to all object types and their objects within an organization. Therefore, it's recommended that you enable these settings only when necessary.

8. **Optional:** Select a pre-configured **language** from the **Language** dropdown menu to choose how the UI and applications will be translated for the user. Note that the default language selected in a user's browser will take precedence.

9. Click **Create**. The new user will then receive an email at the email address entered in step 4 with instructions on creating a password and signing into Core.

Edit or Delete a User

To edit or delete an existing user:

1. Click the  icon in the top bar > **Users** in the **People** section.
2. Click on a user account to open the **Edit User** page.
3. Make changes to the **First Name** and **Last Name** fields as necessary.



Because the user's email address is used to authenticate the user when he or she logs in, modifying the email address previously saved in the **Email** field will not change the address the user must enter to log into Core.

4. Click the  or  icons next to **User Enabled**, **Admin**, and/or **All Access** to enable or disable the user account and/or administrative rights.



All Access grants a user access to all object types and their objects within an organization. Therefore, it's recommended that you enable these settings only when necessary.

5. **Optional:** Select a pre-configured [language](#) from the **Language** dropdown menu to choose how the UI and applications will be translated for the user. Note that the default language selected in a user's browser will take precedence.
6. To delete the user, click the  icon, then click **Yes** to confirm.



It's generally recommended that user accounts are disabled rather than deleted. See the [Important Notes About Deleting or Deactivating User Accounts](#) article for more information.

7. Click **Done** when finished.

Impersonate Another User

With the **Impersonation** feature, administrators can temporarily assume the account of a non-administrative user to work with objects according to that user's [role](#) and permissions. This feature is useful when administrators need to test the user's permission levels, or to complete a task for users who may otherwise be unable to do so themselves. Administrators cannot impersonate other administrators.

Impersonation Mode can also be used to identify and fix any [standard form](#) conflicts for users in multiple roles. See the [Form Conflicts](#) section for more information.

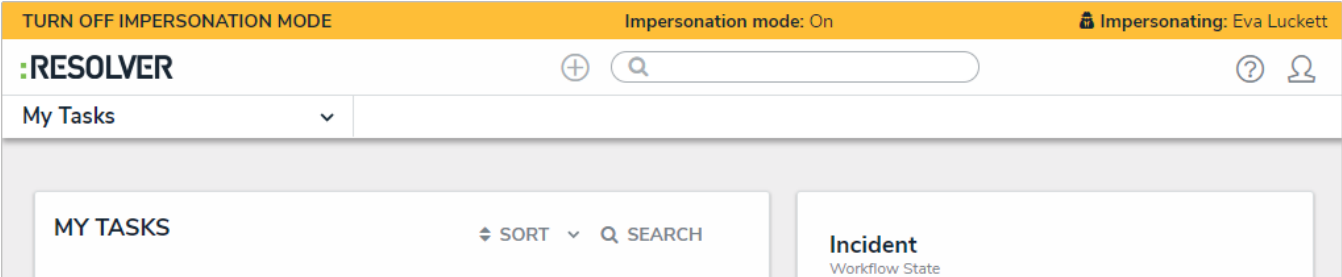


Any changes made while impersonating another user are captured in the [Audit Trail](#).

To impersonate another user:



1. Click the  icon in the top bar > **Users** in the **People** section.
2. Click the **Impersonate** button next to the non-administrative user you wish to impersonate. While in Impersonation Mode, the name of user you're impersonating will appear in a yellow banner at the top of the page.



Active Impersonation Mode.

3. To deactivate Impersonation Mode, click **Turn Off Impersonation Mode** to the left of the banner.

Important Notes About Deleting or Deactivating User Accounts

If a user should no longer have access to your organization in Core, you have the option of disabling that user's account or deleting it from the organization. However, it's generally recommended that user accounts are disabled rather than deleted.

Deleting a user account prevents the user from logging into your organization and accessing any data, but it also removes that user from any objects they were assigned to via a role, which may affect your reporting. Disabling an account also prevents the user from logging in and accessing data, but the user is not removed from any assigned objects, thus maintaining your records.

Also note that deleting an account does **not** remove the user from your Core database. If you require that one or more users are removed from the database, contact [Resolver Support](#) for assistance.

User Groups Overview

Through the **User Groups** feature, you can group certain users together to quickly add that group to a [role](#) , rather than adding each user individually.

EMPLOYEES

Users who can create incidents, but do not have explicit permission to triage, review, or escalate incidents.

USERS

Search for User(s)

+ ADD SELECTED (0)

Aaron Mahaffey

X

Elias Graff

X

Hollie Peel

X

Irwin Cromwell

X

Tracie Bordelon

X

Changes to group membership will not be applied until the user logs out and back in.

ROLES

The following Roles have been linked to this Group

Incident Creator

An existing user group.

EXAMPLE

As with most organizations, your company is comprised of employees and managers. Both employees and managers create incidents, but only managers triage, review, and escalate objects. To keep your CORE users organized, you

create two user groups: Employees and Managers. When you create roles, you add the Employees and Managers user groups into the Incident Creator role and add only the Managers user group to the Incident Reviewer role.

Once a user group has been created, you can add the user group to [roles](#) . If you add new users to a group that was previously added to a role, those users will automatically be added to the role. Any roles a user group has been added to will appear as a link in the **Roles** section of the **Edit User Group** page.

ROLES
The following Roles have been linked to this Group

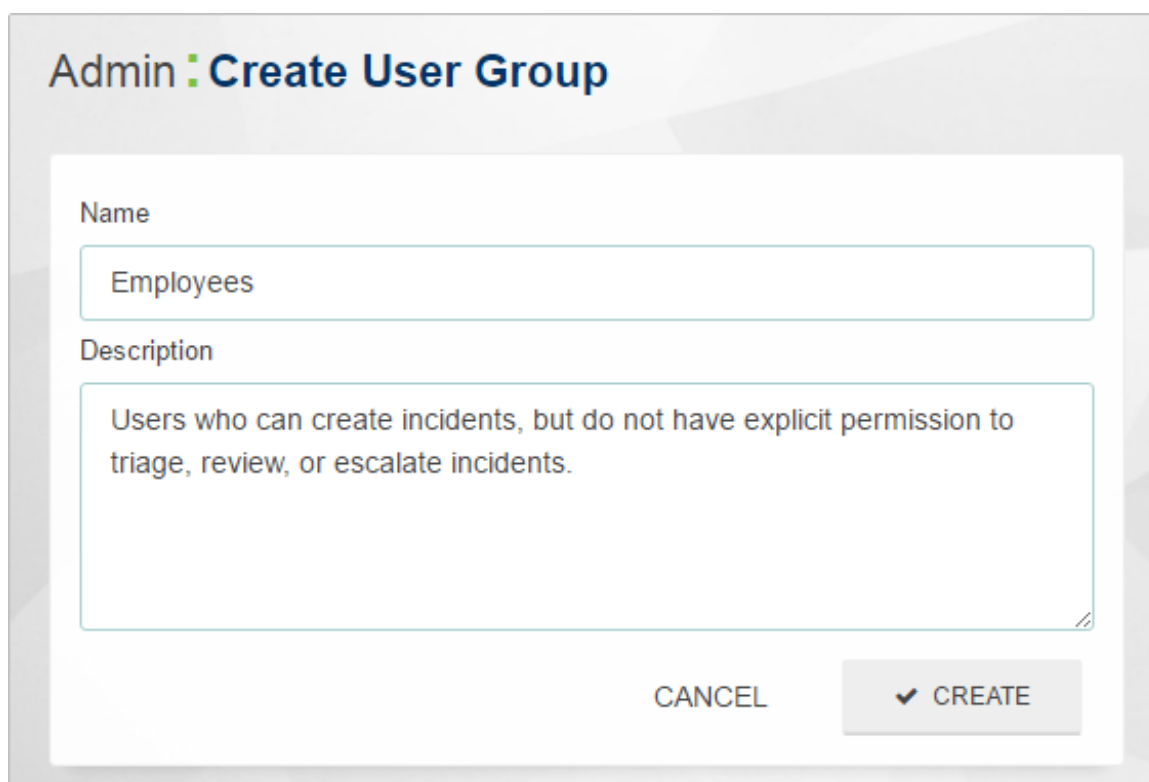
Incident Creator

Roles that a user group has been added to will appear as a link in the Roles section of the Edit User Group page.

Create a New User Group

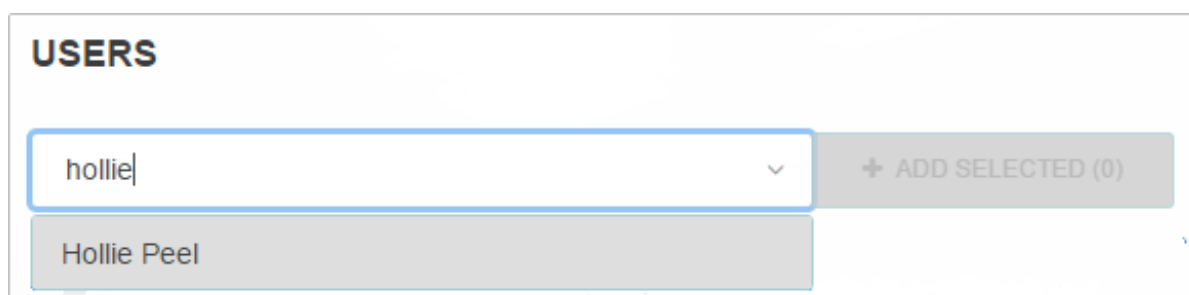
To create a new user group:

1. Click the  icon in the top bar > **Users** in the **People** section.
2. Enter the name for the user group in the **Name** field.
3. **Optional:** Enter a description of the user group. This description will appear below the user group's name when viewing it on the **Edit User Group** page.



The Create User Group page.

4. Click **Create** to display the **Edit User Group** page.
5. In the field under **Users**, begin typing the name of the user you want to add to the group, then press **Enter** on your keyboard or click the user to select them. Continue adding more users as needed.



Searching for existing users to add to a new user group.

6. Click **Add Selected**.

USERS

Hollie Peel x Irwin Cromwell x

Elias Graff x Wendy Marx x

Tracie Bordelon x Aaron Mahaffey x

+ ADD SELECTED (6)



Changes to group membership will not be applied until the user logs out and back in.



Users who are logged in at the time they're added to a user group will need to log out then log back in before the changes are applied.

- Click **Done** when finished.

Edit or Delete a User Group

To edit or delete a user group:

1. Click the  icon in the top bar > **Users** in the **People** section.
2. Enter keywords in the **Search** field to search for the user group by name or click a group to select it.
3. To edit the user group name or description, click the  icon next to the user group name.
4. To add more users to the group, enter the user's name in the field below **Users**, then click **Add Selected**.



Users who are currently logged in at the time they're added to a user group will need to log out then log back in before the changes are applied.

5. To delete a user from the group, click the  icon next to their name, then click **Yes** to confirm.
6. To delete the user group, click the  icon, then **Yes** to confirm.
7. Click **Done** when finished

Roles Overview

Roles control the data that users can create, edit, delete, view, or manage in Core by adding individual [users](#) or [user groups](#) to a role, selecting the object type(s) those users can see, applying either **global** or **explicit** permissions, then configuring the workflow permissions for each object type added to the role.



Users who are logged in at the time their role's permissions are configured will need to log out then log back in before the changes are applied.

Admin : Edit Role

Incident Team

GLOBAL PERMISSIONS



Object Types

Select one...



EDIT PERMISSIONS



Incident



Risk



Users

Search for User(s)



+ ADD SELECTED (0)

Groups

Search for Group(s)



+ ADD SELECTED (0)

Risk Team



An existing role.

Global Permissions

Global permissions grant users access to all the records for the object type(s) added to that role, however, you can control what rights they have (create, read, edit, etc.) and which form is displayed in their [tasks](#) and [Quick Create](#) based on the current state of the object through the role's workflow permissions.

Explicit Permissions

Explicit permissions grant users access to specific objects for the object types added to the role. Before a user can see those specific records, the role must be added as a component on the object type and configurable form, then the user must be selected in the [role field](#) on the form. You can control ~~what rights~~ those users have (create, read, edit, etc.) and which form is displayed in their [tasks](#) and [Quick Create](#) based on the current [state](#) of the object through the role's workflow permissions. You may also need to configure [inferred permissions](#) for roles with explicit permissions enabled.

If a user with explicit permissions on an object type can't see one or more objects, ensure that user has been granted access to the object(s) via the **Role** element on a form. See the [Roles on Forms](#) section for more information. Note that only users with **Manage** permissions can grant other users access to existing objects. See [Workflow Permissions](#) for more information.



Roles determine a user's eligibility to access objects only. Removing a user from a role with explicit permissions after they've been granted direct access to an object does **not** automatically revoke their access to that object. Another user with the appropriate permissions must revoke access by removing the user from the role field on the object's form.

EXAMPLE

Kevin Darden is a manager at your organization, so his role, Incident Reviewer, has been given global permissions so he can read, edit, and manage all Incident objects throughout the workflow. Hollie Peel is a non-managerial employee who may have to create Incident objects, but shouldn't need to view or edit existing objects, except under special circumstances, so she's put in the Incident Creator role which has Create and Read permissions only, as well as the Incident Reviser role, with Read and Edit rights. With the Incident Reviser role added to a configurable form, Kevin can add her to an existing object to grant her permission to add or revise information, however, she won't have permission to access other existing objects until a user from the Incident Reviewer role adds her to an object.

Workflow Permissions

Every object type added to a role requires workflow permission configurations, which allow you to create an additional layer of security on an object for both global and explicit permissions. Through these configurations, you can control what data a user can see and the actions a user can take on an object.

Admin

Edit Role

Edit Incident Status Permissions

Incident Status

Workflow permissions for Incident Team

ALL STATES

⚡ ALL TRIGGERS

+ CREATE

👁 READ

✎ EDIT

🗑 DELETE

⚙ MANAGE

●

Creation

+ CREATE

⚙ MANAGE

⚡ Triggers

SUBMIT

SAVE AS DRAFT

Select a default form for this state for this role

ORM - Log an Incident

●

Draft

👁 READ

✎ EDIT

🗑 DELETE

⚙ MANAGE

⚡ Triggers

SUBMIT

ASSIGN

Select a default form for this state for this role

Default

●

Active

👁 READ

✎ EDIT

🗑 DELETE

⚙ MANAGE

⚡ Triggers

ARCHIVE

ASSIGN

Select a default form for this state for this role

Default

Workflow permissions on an object type.

These permissions can be applied to each individual state added to an object type and include:

- All States:** Clicking **All Triggers**, **Create**, **Read**, and **Edit** in this section will automatically enable these rights for all states in the workflow.

- **All Triggers:** Users can view and click all triggers on a form to transition an object to its next state. The triggers that are visible depend on whether the object is in the state associated with the trigger.
- **Create:** Users can create a new object. This permission applies only to the Creation state of the object type. If granting a user this permission, you must also enable one or more triggers for this state.
- **Read:** Users can view the object when it's in the selected state. You cannot select **Edit**, **Delete**, or **Manage** unless **Read** has been selected.
- **Edit:** Users can edit existing objects in the selected state.
- **Delete:** Users can delete existing objects in the selected state.
- **Manage:** Users can add other users with explicit permissions on the object type to a role field on a configurable form to give them access to the object while it's in the selected state. Note that the user added to the role field on the form will not see the object until it's in a state they have permission to view. **Manage** is applicable to explicit permissions only
- **Triggers:** Users can see and click the selected trigger on a form to transition an object to its next workflow state. The trigger will be visible only when the object is in the state associated with the trigger.
- **Assign:** Once the object is in the selected state, users who have been granted permission to view the object through a role with explicit permissions will see it in their task list on the [My Tasks](#) page.
- **Select a default form this state for this role** The form users will see when using the [Search](#) feature, [Quick Create](#) to create an object, viewing an [assessment table](#) on a form, or opening an object via the [relationship graph](#) :
 - If you **do not** choose a form from this dropdown menu, the object type's default form will be displayed.
 - If you select **Default Form** from this dropdown menu, the user will see the form selected by an administrator elsewhere in Core.
 - If you select a configurable form from this dropdown menu, the selected form will be displayed.

The "Select a default form for this state for this role" dropdown menu in the workflow permissions.



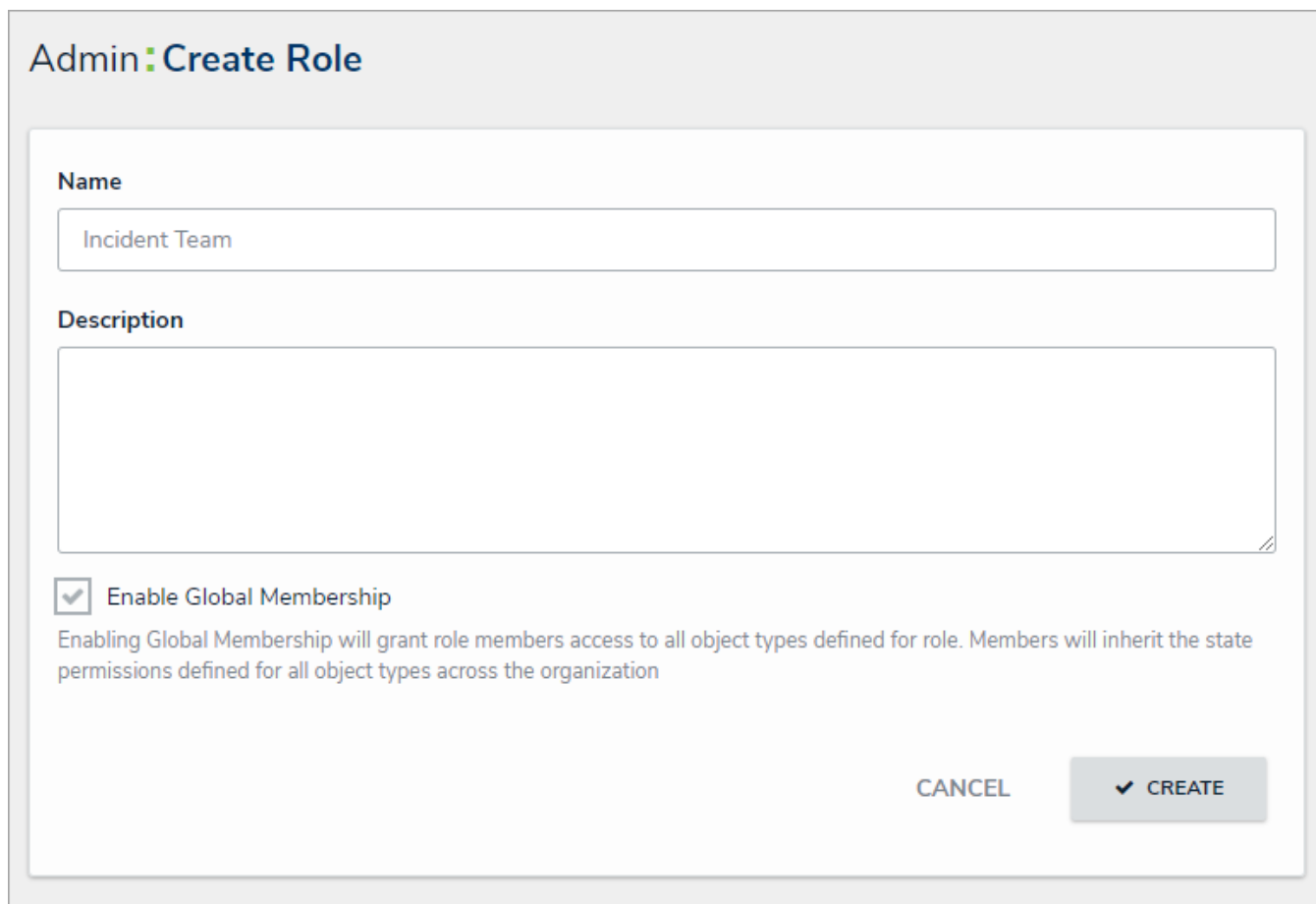
Forms selected in an [action](#), [view](#), [report](#), or [relationship table](#) will override any selections made in the **Select a default form this state for this role** field.

Workflow permissions can be configured on new roles by adding an object type to a role, then clicking **Edit Permissions**. For existing roles, open the **Edit Role** page, then click on a previously added object type to edit the permissions.

Create a New Role

To create a new role:

1. Click the  icon in the top bar > **Roles** in the **People** section.
2. Click **Create Role** to display the **Create Role** page.
3. Enter the name for the role in the **Name** field.
4. **Optional:** Enter a description of the role in the **Description** field. This description will appear below the role's name when editing it.
5. **Optional:** Select the **Enable Global Membership** checkbox if you wish to grant this role global permissions.



Admin: Create Role

Name

Incident Team

Description

☒ **Enable Global Membership**

Enabling Global Membership will grant role members access to all object types defined for role. Members will inherit the state permissions defined for all object types across the organization

CANCEL

The Create Role page.



You will not be able to enable or disable global membership (permissions) from the **Edit Roles** page. If you want to enable or disable global permissions on an existing role, you must delete then recreate the role.

6. Click **Create** to show the **Edit Role** page.
7. In the field under **Object Types**, type the name of the object type you want to add, then press **Enter** on your keyboard or select it from the dropdown menu.

Admin : Edit Role

Incident Team
GLOBAL PERMISSIONS

Object Types

Risk

EDIT PERMISSIONS

Users

Search for User(s)

+ ADD SELECTED (0)

Groups

Search for Group(s)

+ ADD SELECTED (0)

DONE

The Edit Role page.

8. Click **Edit Permissions**. An object type will not be saved to a role until you've configured its workflow permissions.
9. Select the [workflow permissions](#) the user will have per each state:
 - **All States:** Clicking **All Triggers**, **Create**, **Read**, and **Edit** in this section will automatically enable these rights for all states in the workflow.
 - **All Triggers:** Users can view and click all triggers on a form. The triggers that are visible depend on whether the object is in the state associated with the trigger. You can also select each individual trigger to grant access.
 - **Create:** Users can create a new object. This permission applies only to the [Creation](#) state (entry state) of the object type.
 - **Read:** Users can view the object when it's in the selected state. You cannot select **Edit**, **Delete**, or **Manage** unless **Read** has been selected.
 - **Edit:** Users can edit existing objects in the selected state.
 - **Delete:** Users can delete existing objects in the selected state.
 - **Manage:** Users can add users from other roles to give them access to the object while it's in the selected state. Note that the added user will not see the object until it's in a state they have permission to view. **Manage** is

applicable to explicit permissions only.

- **Assign:** Once the object is in the selected state, users who have been granted permission to view the object through a role will see it in their task list on the [My Tasks](#) page. **Assign** is applicable to explicit permissions only.

Admin :: Edit Role :: **Edit Risk Status Permissions**

Risk Status

Workflow permissions for Incident Team

ALL STATES

[⚡ ALL TRIGGERS](#) [+ CREATE](#) [👁 READ](#) [✎ EDIT](#) [🗑 DELETE](#) [⚙ MANAGE](#)

●

Creation

[+ CREATE](#) [⚙ MANAGE](#)

⚡ Triggers [CREATE RISK](#)

Select a default form for this state for this role

Default ▾

●

Active

[👁 READ](#) [✎ EDIT](#) [🗑 DELETE](#) [⚙ MANAGE](#)

⚡ Triggers [ARCHIVE](#)

[📌 ASSIGN](#)

Select a default form for this state for this role

Default ▾

●

Archived

[👁 READ](#) [✎ EDIT](#) [🗑 DELETE](#) [⚙ MANAGE](#)

⚡ Triggers [UNARCHIVE RISK](#)

[📌 ASSIGN](#)

Select a default form for this state for this role

Default ▾

Workflow permissions.

10. From the **Select a default form for this state for this role** dropdown menu, choose the form users will see when using [Search](#) , [Quick Create](#) , an [assessment table](#) , or [relationship graph](#) :
 - If you **do not** choose a form from this dropdown menu, the object type's default form (the unconfigured list of components added to an object type) will be displayed.
 - If you select **Default Form** from this dropdown menu, the user will see the form selected by an administrator.
 - If you select a configurable form from this dropdown menu, the selected form will be displayed.



Forms that have been selected to display on [action](#) , [view](#) , [report](#) , or [relationship table](#) will override any selections made in the **Select a default form for this state for this role** field.

11. Click **Done** to return to the **Edit Roles** page.
12. Repeat steps 7-11 to continue adding object types as needed.
13. To add individual users to the role:
 - a. In the field under **Users**, begin typing the name of the user you want to add to the role in, then press **Enter** on your keyboard or click to select the user.
 - b. Repeat step a. as needed to continue adding more users, then click **Add Selected**.
14. To add a **user group** to the role:
 - a. In the field under **Groups**, begin typing the name of the group you want to add to the role, then press **Enter** on your keyboard or click to select the group.
 - b. Repeat step a. as needed to continue adding more user groups, then click **Add Selected**.
15. Click **Done** when finished.

Edit or Delete a Role

To edit or delete a role:

1. Click the  icon in the top bar > **Roles** in the **People** section.
2. Click the role you want to edit.
3. To add more object types to the role, select the object types from the dropdown menu in the **Object Types** section, then edit the permissions.
4. To edit an existing object type's [permissions](#), click the object type under **Object Types**, make your changes as needed, then click **Done** to return to the **Edit Role** page.
5. To add more users or groups to the role, select them from the dropdown menus under **Users** and **Groups**.
6. To delete an object type, user, or user group from the role, click the  icon next to the object type, user, or user group you want to delete, then click **Yes** to confirm.



Roles determine a user's eligibility to access objects only. Removing a user from a role with explicit permissions after they've been granted direct access to an object does **not** automatically revoke their access to that object. Another user with the appropriate permissions must revoke access by removing the user from the role field on the object's form.

7. To delete the role, click the  icon, then click **Yes** to confirm.

Org Manager Overview

The **Org Manager** tool gives you the option of creating duplicate organizations in Core. This feature is useful for organizations with multiple companies or for those who want to segment their data by region or department by duplicating the configurations of the existing organization, including user accounts. The Org Manager does **not** duplicate data.

Organizations are duplicated by first exporting an existing organization's data into a .JSON file, then importing that file into the Org Manager of a blank organization.

Important Notes About Org Manager

Org Manager is typically used as an internal tool for Resolver to create duplicate organizations on behalf of Core customers. Under certain circumstances, Resolver may allow your IT department to complete the process. Please [contact us](#) should you require duplicate organizations.

Export an Organization

As importing an organization requires a .JSON file from an existing organization, you must first complete the export process to create and save the file then import it into a blank organization.

To export an organization:

1. Click the  icon in the top bar > **Org Manager** in the **Application Management** section.
2. Click **Export Organization**.
3. Enter the name of the organization you're exporting in the **Name** field, then enter a version in the **Version** field. The values entered in these fields will determine the name of the .JSON file (e.g. ABC Corp 2.json).

EXPORT ORGANIZATION

Name

ABC Corp

Version

2

CANCEL

✓ EXPORT

The Export Organization section of Org Manager.

4. Click **Export**. The file will be saved in your **Downloads** folder.

Import an Organization

Before import, a .JSON file must be [exported](#) from the existing organization. Once this .JSON file is imported, all configurations and user accounts from the exported organization will be recreated in the new organization.

If a user already exists in another organization within the same environment, the user accounts will be merged, using the email address and password of the existing user. If the imported user is new to the environment, a new account will be created and the user will receive an email with details on accessing the organization and creating a new password.

To import an organization:

1. Contact [Resolver Support](#) to request a new blank organization in your environment.
2. Log in as an administrator.
3. Click the  icon in the top bar > **Org Manager** in the **Application Management** section.
4. Click **Import Organization**.

IMPORT ORGANIZATION

Drag and drop (or browse for) an Organization to import.

Drag file here or click to upload

The Import Organization section of Org Manager.

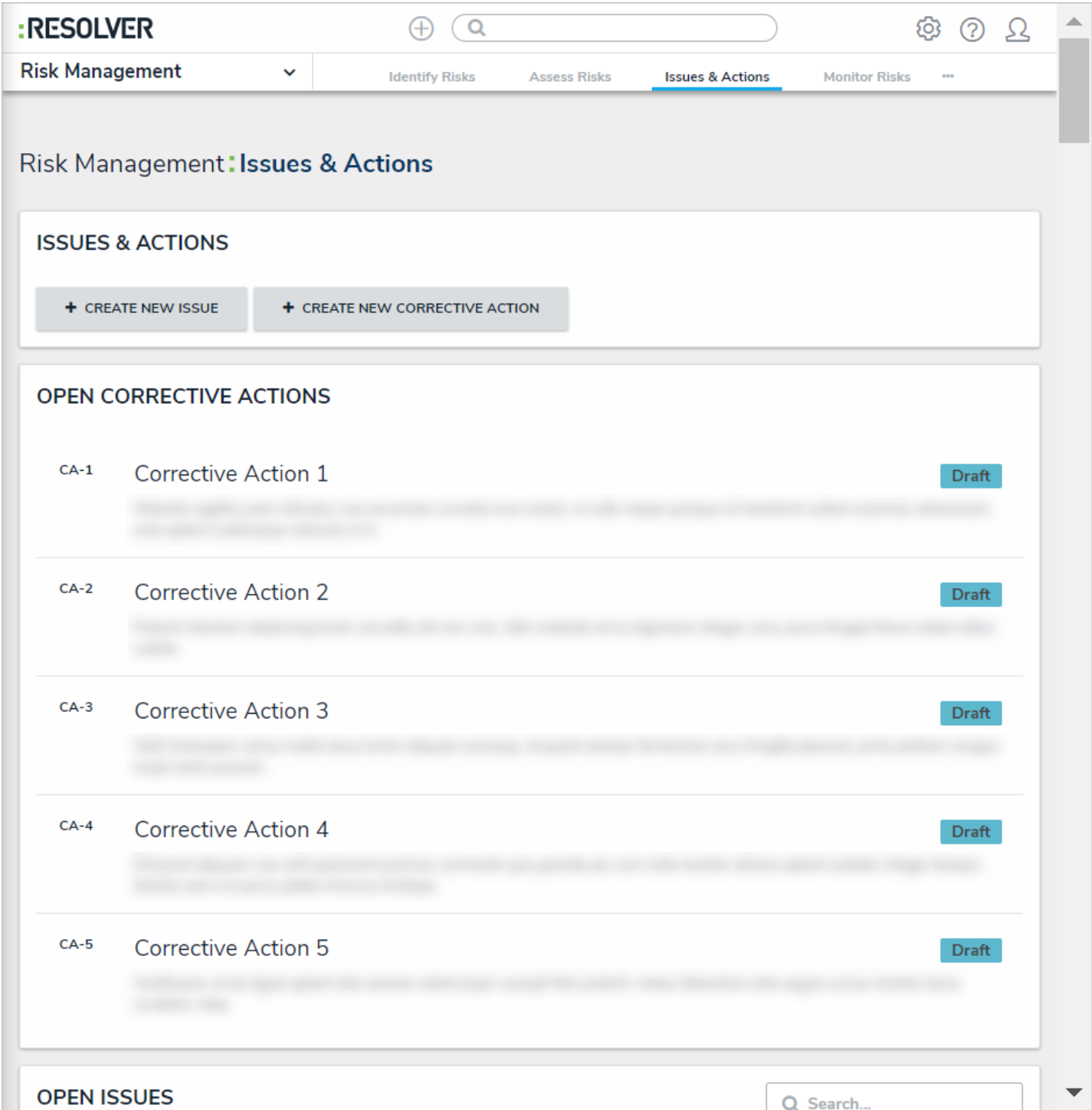
5. Drag and drop the .JSON file to the upload area or click the area to locate and open the file, which will automatically start the upload. If upload was unsuccessful, a confirmation message will be displayed.



If you're unable to complete the upload due to any errors, contact [Resolver Support](#).

Applications Overview

Applications are created when object type groups, fields, configurable forms, and roles come together. An application controls and directs the movement of data to end users and allows them to complete tasks and view information via activities, which then determines what kind of data a user will create, edit, and view through [actions](#) , [views](#) , and [roles](#) .



An application displaying activities, actions, and views.



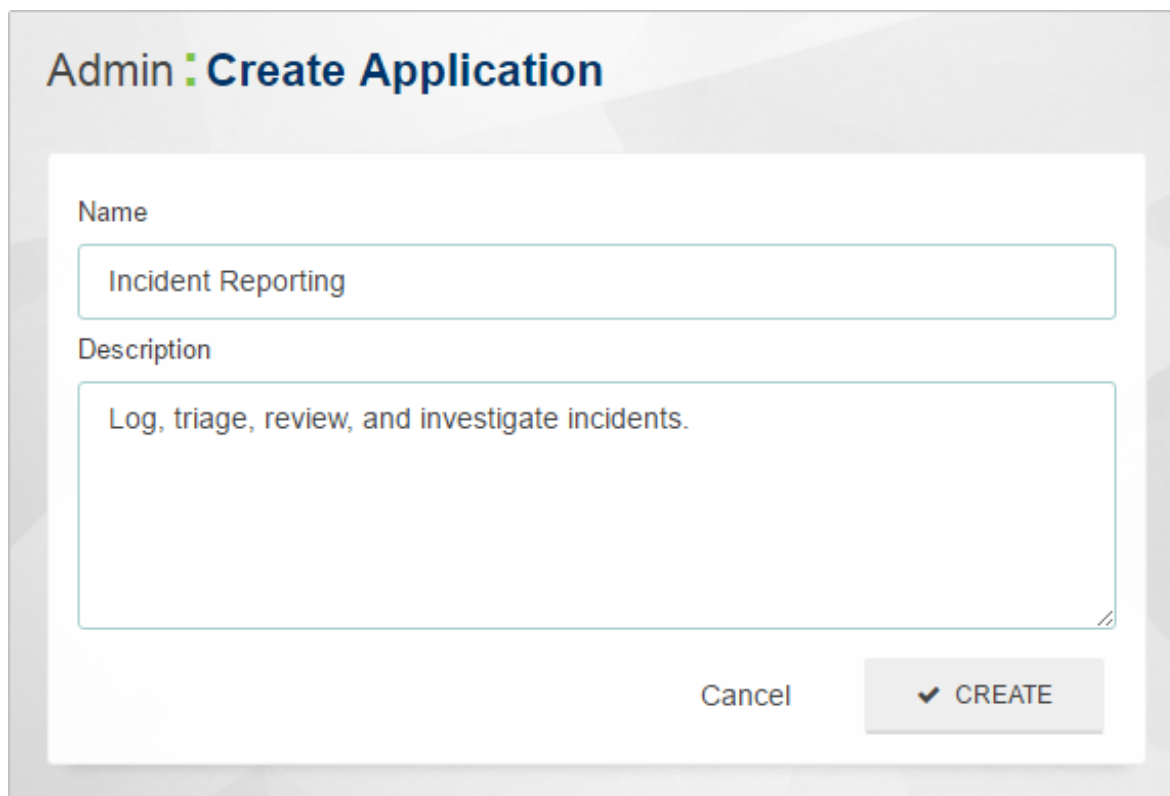
Both end users and administrators will not be able to see an application in the left navigation menu until they've been added to a role on an activity.

Because applications rely on other key components of Core, such as object types and roles, you can't create an application until these other components exist. See the [About Applications](#) section to review the recommended process for creating these components.

Create an Application & Activity

To create an application and activity:

1. Click the  icon in the top bar > **Applications** in the **Application Management** section.
2. Click **Create Application** to display the **Create Application** page.
3. Enter the application name in **Name** field.
4. **Optional:** Enter a description of the application in the **Description** field. This description will appear on the **Applications** page and on the **Edit Application** page in **Administration**.



Admin : Create Application

Name

Incident Reporting

Description

Log, triage, review, and investigate incidents.

Cancel

✓ CREATE

The Create Application page.

5. Click **Create** to show the **Edit Application** page.
6. Click **Create an Activity**.

Admin : **Edit Application**

INCIDENT REPORTING

Log, triage, review, and investigate incidents.

ACTIVITIES

+ CREATE AN ACTIVITY

  DONE

The Edit Application page.

7. Enter a name for the activity in the **Name** field.
8. **Optional:** Enter a description or brief instructions to users in the **Description** field which will appear when editing an activity and viewing the Activity settings. If necessary, you can apply additional styling to the text using [Markdown](#) formatting. To view popular formatting styles, click the  icon next to **Basic Markdown Formatting**.

ACTIVITIES

Name

Report an Incident

Description

Prior to creating an incident report, please review the Health & Safety Manual for additional instructions and information on what to do in the case of an emergency.

 Basic Markdown Formatting

Cancel  CREATE

Creating a new activity on the Edit Application page.

9. Click **Create** to display the **Edit Activity** page, where you can create actions and views and add roles.

Admin : **Edit Activity**

REPORT AN INCIDENT



Prior to creating an incident report, please review the Health & Safety Manual for additional instructions on what to do in the case of an emergency.

ACTIONS

There are no Actions on this Activity

+ ADD ACTION

VIEWS

There are no Views on this Activity

+ ADD VIEW

ROLES

There are no Roles linked to this Activity

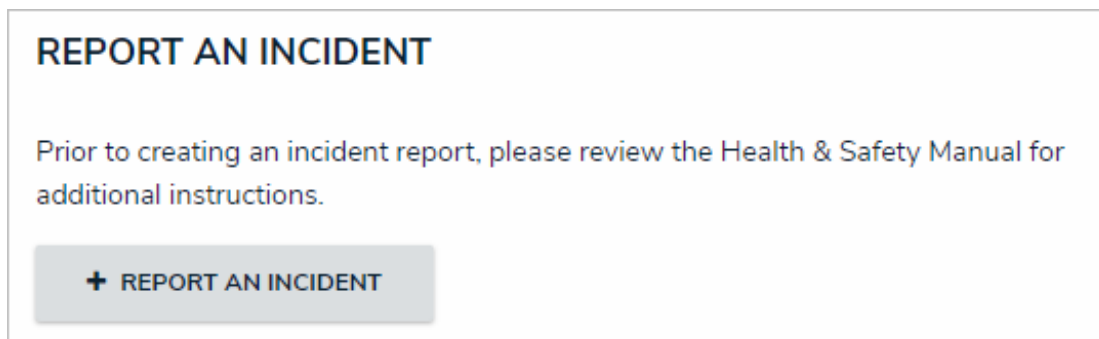
+ ADD ROLES

The Edit Activity page.

Add an Action to an Activity

An action is where a user can create objects or [assessment](#) objects or [export data](#) from within an activity. An action is displayed in its own section with a button that, when clicked, will display a selected form for users to enter and save data into an object.

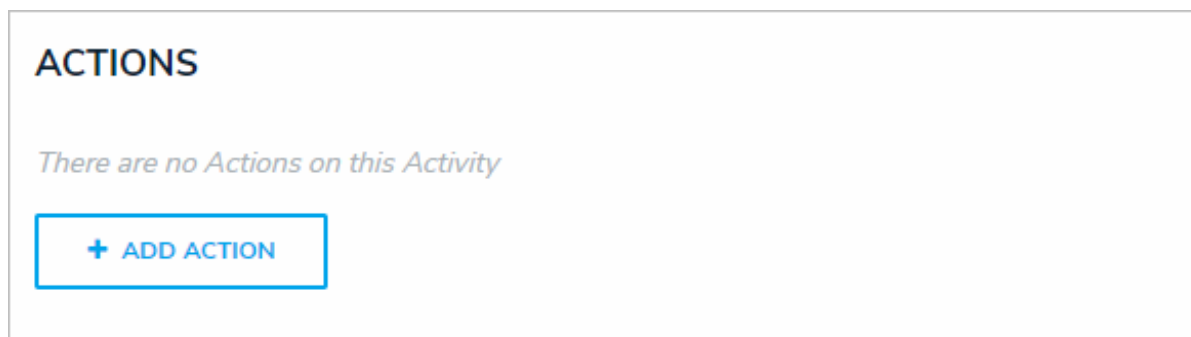
Actions are saved to activities within an application. See the [Create an Application & Activity](#) section for more information.



A create object type action as it appears to end users in an activity.

To create an action:

1. If needed, open the activity you wish to add the action to by clicking the  icon in the top bar > **Applications** in the **Application Management** section, then clicking the application and activity to show the **Edit Activity** page.
2. Click the **Add Action** in the **Actions** section.



The Actions section on the Edit Activity page.

3. Enter the name of the action in the **Action Name** field, which will appear as a clickable button when the user views the activity.
4. To create an object type action:
 - a. Select **Create Object** from the **Action Type** dropdown menu.
 - b. Select the object type the user will input data into from the **Object Type** dropdown menu.
 - c. Select either the default form or a [configurable form](#) to display when the user opens the action from the **Define Form to Show When Creating New** dropdown menu.

ACTIONS

Action Name

Action Type

Create Object

Object Type

Incident

Define Form to Show When Creating New

New Incident

CANCEL

✓ CREATE

A new object type action.

5. To create an [assessment](#) action:

- Select **Create Assessment** from the **Action Type** dropdown menu.
- Select the assessment the user will create objects for from the **Assessment Type** dropdown menu.
- Select a [configurable form](#) to display for the action from the **Define Form to Show When Creating New** dropdown menu.



You must select a configurable form that includes the [Assessment Context](#) element in the **Define Form to Show When Creating New** dropdown menu. You cannot select the assessment's default form as it will not display the required [focus or dimensions](#) fields.

ACTIONS

Action Name

Action Type

Assessment Type

Define Form to Show When Creating New

CANCEL

✓ CREATE

A new assessment action.

6. To create a [data export](#) action:
 - a. Select **Data Export** from the **Action Type** dropdown menu.
 - b. Select an export report from the **Report** dropdown menu.

ACTIONS

Action Name

Action Type

Report

CANCEL

✓ CREATE

A new data export action.

7. Click **Create**.
8. Follow steps 2-7 above to continue creating more actions as needed.

9. To modify the order of the actions in the activity, click and drag the  icon beside an action.
10. To edit the action's name or form, click the  icon.
11. To delete the action, click the  icon, then **Yes** to confirm.

Add a View to an Activity

Activity **views** can display the following:

- A list of objects or [assessment](#) objects (a **form view**);
- Reports with elements (a **report view**); and/or
- Data analytics reports (a **data export view**).

When creating a form view, you can specify which objects and forms are displayed based on the object type, [workflow state](#) , and type of view you wish to display. If you're adding a report, you can define which form a user will see when he or she clicks on data displayed in a [table](#) . If you're adding a data export view, you can select a data analytics report to filter the data.

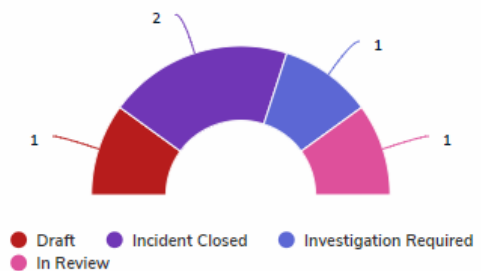
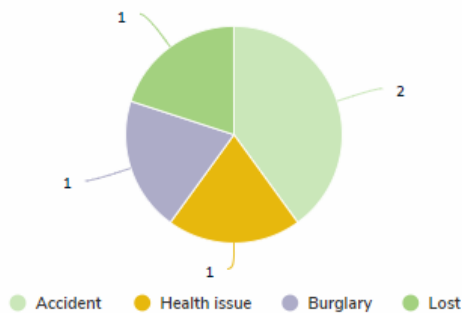
INCIDENTS AWAITING REVIEW

Please review these incidents. If the issue requires no further action click Close Incident on the form. Once the incident is closed, it can be viewed in the View Closed Incidents activity.

Click Request Additional Info if additional information or revisions to the form are required. If an investigation is required, click Submit for Investigation.

I-4	SB/Accident 2016/09/14	In Review
I-9	KD/Found 2016/03/11	In Review
I-16	HP/Health Issue 2016/10/20	In Review

A form view as it appears to end users.



Incidents at this location Name	What Happened?	Incident Type	Location
IC/Burglary 2016/11/16	Sheba Boudreau was opening up the office and saw that one of the windows by the back door was broken. It looks like a cell phone and laptop computer were stolen.	Burglary	Montreal, Toronto
KD/Emergency 2016/07/03	Hollie Peel was having an asthma attack. Sheba Boudreau helped her take her rescue inhaler, while Wendy Marx called the ambulance. She's okay now.	Health issue	Montreal
KD/Lost 2016/04/02	A clerk in the officer reported that she lost her cell phone. Cannot confirm at this time if it was stolen, but I sent out a notice to all employees to keep an eye out.	Lost	Edmonton, Montreal, Toronto
SB/Accident 2016/09/14	There was a car accident outside the rear entrance. It appears the driver in the red car was responsible as she was talking on her cell phone. No injuries were reported, however, I've been told we may be contacted by the drivers' respective insurance companies.	Accident	Montreal
HP/Accident 2016/9/21	A customer reported that a elderly gentleman fell in the hallway. The floor didn't appear to be wet and there didn't seem to be any other hazards. Security confirmed the same with me.	Accident	Montreal, Toronto

Page 1 of 1 | 5 Rows

A report view as it appears to end users.

Location Data Export

ANALYTICS EXPORT

This tool is used to export all data defined by the below parameters into an Excel format that can be consumed by third-party analytics tools. Note: permissions are applied on export.

EXPORT DETAILS

Report Name: Location Data Export

Report Focus:

Location > Incident

Anchor Object: Montreal

CANCEL

 EXPORT TO EXCEL

A Data Export view as it appears to end users.

Views are saved to activities within an application. See the [Create an Application & Activity](#) section for more information on creating applications and activities.



Users can export table data from a report into a Word or Excel document by clicking the Word and Excel icons in the top-right of the view page. See the [Reports](#) section for more information on creating tables. Note that pie charts and heat map data cannot be exported.



Any forms selected when creating a view or report will override any form selections made in the [workflow permissions](#) on a role.

To create a view:



1. If needed, open the activity you wish to add the view to by clicking the  icon in the top bar > **Applications** in the **Application Management** section, then clicking the application and activity to show the **Edit Activity** page.
2. Click the **Add View** in the **Views** section.
3. Enter the name of the view in the **Name** field, which will appear as a header below the view.
4. **Optional:** Enter a description in the **Description** field, which will appear when a user has opened the view. If necessary, apply [Markdown](#) formatting to the text. To view popular formatting styles, click the  icon beside **Basic Markdown Formatting**.
5. Select an object type or [assessment](#) from the **Object Type or Assessment** dropdown menu to specify which objects will be available in the view.
6. Select one or more assessment or object type states from the **Workflow States** dropdown menu to specify which objects or instances will be displayed, based on their current states.
7. To create a **form view**:
 - a. Select **Form** from the **View Action** dropdown menu.
 - b. From the **Define Form to Show** dropdown menu, select either the default form or a [configurable form](#) to display when the user clicks on an object in the view.

Name

Draft Incidents

Description

These incidents have not yet been submitted to your manager for review.

Basic Markdown Formatting 

Object Type or Assessment

Incident

Workflow States

 Draft 

View Action

Form

Define Form to Show

New Incident

A new form view.

8. To create a **report** view:
- a. Select **Report** from the **View Action** dropdown menu.
 - b. Select a previously created report from the **Define Report to Show** dropdown menu.

Name

Incidents by Location

Description

Basic Markdown Formatting

Object Type or Assessment

Location

Workflow States

Default

View Action

Report

Define Report to Show

Incidents by Location Reports

A new report view.

9. To create a **data export** view:
- a. Select **Data Export** from the **View Action** dropdown menu.
 - b. Select a previously created **data analytics report** from the **Define Data Export to Show** dropdown menu.

Name

Location Data

Description

Basic Markdown Formatting

+

Object Type or Assessment

Location

Workflow States

Default

x

View Action

Data Export

Define Data Export to Show

Location Data Export

A new data export view.

10. Click **Create**.
11. Follow steps 2-10 above to continue creating more views as needed.
12. To reorder how the views appear in the activity and left navigation menu, click and drag the  icon beside a view.
13. To edit the view's name, description, view action, or form, click the  icon.
14. To delete the view, click the  icon, then **Yes** to confirm.

Add Roles to an Activity

All users, including administrators and those with [All Access](#) settings enabled, will not be able to see an application in the left navigation menu until they've been added to one or more activities through a [role](#). Note that adding a role to one activity with an application will not grant access to all its activities. Roles must be added to each activity individually in order to grant access.

Roles are saved to activities within an application. See the [Create an Application & Activity](#) section for more information on creating applications and activities.



If you've recently added your role to an activity, you will need to log out then log back in before the application and/or activity will be displayed in the left navigation menu.

To add roles to an activity:

1. If needed, open the activity you wish to add the role to by clicking the  icon in the top bar > **Applications** in the **Application Management** section, then clicking the application and activity to show the **Edit Activity** page.
2. Click **Add Roles** in the **Roles** section.
3. Select one or more roles from the dropdown menu.

ROLES

There are no Roles linked to this Activity

Incident Creator

×

Managers

×

▼

CANCEL

✓ ADD ROLES

Roles selected, but not yet added to an activity.

4. Click **Add Roles**.



To remove a role from the activity, click the trash can icon next to the role, then click **Yes** to confirm.

Edit or Delete an Application

To edit or delete an application:

- 1. Click the  icon in the top bar > **Applications** in the **Application Management** section.

✓ You can rearrange the order of existing applications on the **Applications** page by clicking the  icon next to an application then dragging and dropping the application to new a location on the page.

- 2. Click an existing application to display the **Edit Application** page.

Admin : **Edit Application**

INCIDENT REPORTING

To log, triage, review, and investigate incidents.

ACTIVITIES

+ CREATE AN ACTIVITY

Report an Incident

Prior to creating an incident report, please review the Health & Safety Manual for additional information on how to report an incident and what to do in the case of an emergency.

Review an Incident

Investigate an Incident

View Closed Incidents

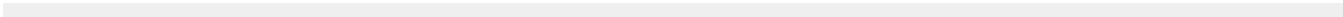
The Edit Application page.

- 3. To edit the name or description of the application, click the  icon next to the application’s name at the top of the page.
- 4. To delete the application, click the  icon, then click **Yes** to confirm.

⚠ Deleting an application will delete all activities associated with it.

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Edit or Delete an Activity

To edit or delete an activity:

1. Click the  icon in the top bar > **Applications** in the **Application Management** section.
2. Click an application to display the **Edit Application** page.
3. Scroll down to view the **Activities** section.

ACTIVITIES

+ CREATE AN ACTIVITY

Report an Incident

Prior to creating an incident report, please review the Health & Safety Manual for additional information on how to report an incident and what to do in the case of an emergency.

x

||

Review an Incident

x

||

Investigate an Incident

x

||

View Closed Incidents

x

||

The Activities section on the Edit Application page.

4. To rearrange the order of the activities as they appear in the left navigation menu, click the  icon next to an activity then drag it to a new location on the page.
5. To edit the name or description of the activity:
 - a. Click an activity from the **Edit Application** page to show the **Edit Activity** page.
 - b. Click the  icon next to the activity at the top of the page.
 - c. Click **Done** to return to the **Edit Application** page.
6. To delete an activity, click the  icon next to the activity, then click **Yes** to confirm.



Deleting an activity will delete all the actions or views associated with it.

7. Click **Done** when finished.

Edit or Delete an Action or View

To edit or delete an action or view:

- 1. Click the  icon in the top bar > **Applications** in the **Application Management** section.
- 2. Click an application to display the **Edit Application** page.
- 3. Scroll down to view the **Activities** section.

ACTIVITIES

+ CREATE AN ACTIVITY

Report an Incident

Prior to creating an incident report, please review the Health & Safety Manual for additional information on how to report an incident and what to do in the case of an emergency.

x

||

Review an Incident

x

||

Investigate an Incident

x

||

View Closed Incidents

x

||

The Activities section on the Edit Application page.

- 4. Click an activity to show the **Edit Activity** page.
- 5. To edit the details of an action or view, click the  icon next to the action or view.



Once saved, you **cannot** select a new object type for an action or a view without deleting then recreating that action or view.

- 6. To delete an action, view, or role from the activity, click the  icon next to that action, view, or role, then click **Yes** to confirm.
- 7. Click **Done** when finished.

Data Import Overview

Using the **Data Import** feature, you can create or update multiple objects, their field values, roles, and/or states as well as map relationships, all at once, by entering data into a spreadsheet then uploading that spreadsheet into Core. **This feature cannot create new object types, fields, or relationships.**

Before you can import data, you must ensure the object types and relationships you wish to import data into already exist in Core. Additionally, you'll need a template Excel spreadsheet to enter the data to be imported, then upload it to Core. To get a copy of this spreadsheet, contact [Resolver Support](#).

 Data Import allows spreadsheets with up to 15 MB of data to be uploaded.

 It's recommended that only users with advanced knowledge of Core and its configurations import data.

Data Import

Drag and drop (or browse for) a Core-configured Excel data import file.

Drag file here or click to upload

One file can be uploaded at a time. Date field values will be imported in UTC timezone

☐ Verify file only

Identifier type

Object ID

The import supports using External References as well as Object IDs

The Data Import page.

	A	B	C	D	E	F	G	H
1	Object Type ID							
2								
3								
4	External Ref ID	Name	Description	FIELDUNINAME1	FIELDUNINAME2			
5								
6								
7								
8								
9								
10								
11								
12								

A blank data import template.

On the template, each worksheet tab represents one object type or relationship. You may add more worksheets as needed or rename the tabs, but you must delete any blank worksheets prior to import.

OBJECT 1 -	OBJECT 2 -	RELATIONSHIP -
------------	------------	----------------

The worksheet tabs in the template.

Create an Import Template

To complete a data import, you must first generate an **import template**. This template is a spreadsheet generated through the [Data Import](#) settings and contains separate worksheet tabs for each object type and relationship added to the template. Administrators then enter data in the appropriate tabs and upload the spreadsheet back into Core.

	A	B	C	D	E	F	G	H
1	Object Type ID							
2	CorrectiveAction							
3				Actual Action Completion Date	Expected Action Completion Date	Assignable Role	Library Workflow	
4	External Ref ID	Name	Description	ACTIONCOMP	EXPECTEDCO	Corrective Action Own	Corrective Action Status	
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								

An object type worksheet in the template.

	A	B	C	D	E	F	G
1	Relationship ID	Object Type ID	Object Type ID				
2	Control-Test	Control	Test				
3	Control	(optional)	Test	(optional)			
4	OB1 Ext Ref ID	Object Name	OB2 Ext Ref ID	Object Name			
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							

A relationship worksheet in the template.

To generate an import template:



1. Click the  icon in the top bar > **Data Import** in the **Tools** section.
2. Scroll down to the **Export Data Import Template** section. This section displays all the object types and relationships in your organization. Relationships are displayed immediately below their related object type.
3. Click to select the object types and relationships you wish to add to the template or click **Select All Object Types** to add all object types and relationships. To remove a object type or relationship from the template, click it again to deselect it.
4. Click **Export** to begin downloading the template. If you selected a large number of object types and relationships, there may be a delay before the download begins.

Export Data Import Template

Select object types to include in template

[SELECT ALL OBJECT TYPES](#)

☒	Process	OBJECT TYPE
☒	Risks	RELATIONSHIP
☒	Sub Processes	RELATIONSHIP
☒	Requirement	OBJECT TYPE
☒	Controls	RELATIONSHIP
☒	Issues	RELATIONSHIP
☐	Requirement Detail	RELATIONSHIP
☐	Risks	RELATIONSHIP
☐	Source of Requirement	RELATIONSHIP
☐	Requirement Detail	OBJECT TYPE
☐	Risk	OBJECT TYPE

 **EXPORT**

Clicking Export will start the template download. The Export button will be grayed out if no object types or relationships are selected.

- Once downloaded, click the file at the bottom of your browser to open it. By default, the file's title is your organization's name and the date the template was generated.
- Enter the data you wish to import. You can [create new objects](#) or [edit existing objects](#) on an object type worksheet or [map two objects together](#) on a relationship worksheet.
- [Upload the spreadsheet](#) to complete the import.

Enter New Object Data on the Import Template

This section outlines how to create new objects using the **Data Import** feature. For information on updating objects, see [Update Existing Object Data on the Import Spreadsheet](#).

	A	B	C	D	E	F	G
1	Object Type ID						
2	Control						
3							
4	External Ref ID	Name	Description	Assigned Date	Count	Design Effectiveness	Frequency
5	CONT-1	Control 1		ASSIGNEDDATE	COUNT	DESIGNEFFECTE	FREQUENCY
6				2018-07-16	25	Effective	Quarterly
7							
8							
9							
10							
11							
12							
13							

An import template.

To import new object data:

1. Open the data import template. See the [Create an Import Template](#) article for instructions on generating this spreadsheet.
2. Click an object type tab, which are highlighted, to open its worksheet (e.g. Risk). Tabs are generated in alphabetical order, with relationship tabs labelled with the monogram of the object type they're saved on and their object type group (e.g. R - Control). See [Enter Relationship Data on the Import Spreadsheet](#) for instructions on mapping relationship objects. Tabs are generated in alphabetical order.

Risk	R - Control	R - Incident Type	R - Issue	R - Indicator	Risk Category
------	-------------	-------------------	-----------	---------------	---------------

Tabs on an import template spreadsheet. Object type tabs are highlighted (e.g. Risk and Risk Category) and the relationship tabs are labelled by their associated object type's monogram and object type group.



Modifying any of the headers in rows 1-4 of the spreadsheet will cause an error when the template is uploaded.

3. On row 5, column A of the spreadsheet, below **External Ref ID**, enter a name or code to identify the object in the system. The reference ID may be whatever you choose, however, each ID must be unique.

	A
1	Object Type ID
2	Control
3	
4	External Ref ID
5	CONT-1
6	

The External Ref ID column, below the Object Type ID.

4. On row 5, column B of the spreadsheet, below **Name**, enter the name of the object.

B	C
Name	Description
Control 1	

The Name and Description columns. An object description is optional.

5. **Optional:** On row 5, column C, below **Description**, enter a description of the object.
6. To import data into a field linked to the object type, enter data below the field's column. Field columns begin at column D and are labelled in row 3 with the field's name and in row 4 as the field's **Unique Name**. If the field is:
- **Plain text**, enter the data as needed.
 - **Numeric**, enter numbers only.
 - **Date and time**, enter a date and/or time. Core will automatically modify the field entry to show the date and/or time based on the format selected in the field's settings. Date and time data is imported in the UTC time zone, as such, it may be necessary to include a time when importing a date (e.g. 12:00 pm) to avoid the date being recorded one day in advance due to a time difference.
 - **Select list**, enter an option from the select list. Select list options are not case-sensitive when importing data, however, all other characters entered into the spreadsheet must match the option exactly.
 - **Multi-select list**, enter one or more of the options from the select list, separated by commas, with no spaces (e.g. high,medium,low). Select list options are not case-sensitive when importing data, however, all other characters entered into the spreadsheet must match the option(s) exactly.

D	E	F	G
<i>Assigned Date</i>	<i>Automated Control</i>	<i>Count</i>	<i>Design Effectiveness</i>
ASSIGNEDDA	AUTOMATEDC	COUNT	DESIGNEFFE
January 18, 2018		5	Effective

Entering data to import into the object's fields.

7. To assign users from a specific [role](#) to the object:

- Locate a role column in the spreadsheet. Role columns appear after field columns and are labelled in row 3 as **Assignable Role** and in row 4 as the role's name.
- Enter the user's email address as it's saved in their profile in a cell below the desired column. If you're assigning multiple users, separate the users' email addresses by commas (e.g. user1@example.com,user2@example.com).



There may be a delay in completing imports that include role assignments, depending on the complexity of the role's permissions and/or the number of roles being assigned.

- Continue assigning users to additional roles, if any.

N	O	P	Q
<i>Assignable Role</i>	<i>Assignable Role</i>		
Owner	Reviewer		
user1@example.com	user1@example.com,user2@example.com		

Role columns in the template.

8. To assign a [workflow](#) state to the object:

- Locate a workflow column in the spreadsheet. Workflow columns appear after any role columns and are labelled in row 3 as **Library Workflow** and in row 4 as the workflow's name.
- Enter the state's name as it's saved in the workflow (e.g. In Progress) below the workflow column.

P
<i>Library Workflow</i>
Control Status
In Progress

A workflow column in the template.



Workflow [transitions](#) and [actions](#) are not activated on imported objects.

- Repeat the steps above to continue adding data, as needed. If you do not wish to add data to an additional field, role, or workflow, leave the cells below the respective columns blank. To import data on a different object type, select the appropriate worksheet.
- Save your changes.
- [Upload the spreadsheet](#) to complete the import.

Enter Relationship Data on the Import Template

To import relationships from one object to another, you must know both objects' **external reference IDs**. If you're importing relationships into objects that are being imported on the same spreadsheet, you can collect the reference IDs from the **External Ref ID** column from the object's worksheet.

If the relationship data is being imported into existing objects (rather than a new object being imported on the same spreadsheet), you can retrieve the external reference IDs from a previous spreadsheet used to import the objects, from a spreadsheet generated by the [Audit Trail](#) feature, or by adding the **External Reference ID** data type to a [report table](#).

EXAMPLE

The Person object type has a Last Known Location relationship saved to it, which pulls data from the Location object type. To import data into this relationship, you enter a Person object into the spreadsheet first (e.g. PERS-1/Melvin Jacks), which is the object that will display in the relationship, then enter the Location object (PLAC-1/City Shopping Mall), which is the object that the relationship will draw its data from. This will show that Melvin Jacks' last known location was the City Shopping Mall.

	A	B	C	D
1	Relationship ID	Object Type ID	Object Type ID	
2	Person-Location	Person	Location	
3	Person	(optional)	Location	(optional)
4	OB1 Ext Ref ID	Object Name	OB2 Ext Ref ID	Object Name
5	PERS-1	Melvin Jacks	LOC-1	City Shopping Mall
6				
7				

Data entered into a relationship worksheet on the template.

To enter relationship data on the spreadsheet:

1. Open the data import template. See the [Create an Import Template](#) article for instructions on generating this spreadsheet.
2. Click relationship tab to open its worksheet. Tabs are generated in alphabetical order, with relationship tabs labelled with the monogram of the object type they're saved on and their object type group (e.g. R - Control). Object type tabs are highlighted. For information on entering object data, see the [Enter New Object Data on the Import Spreadsheet](#) article.

Risk	R - Control	R - Incident Type	R - Issue	R - Indicator	Risk Category
------	-------------	-------------------	-----------	---------------	---------------

Tabs on an import template spreadsheet. Object type tabs are highlighted (e.g. Risk and Risk Category) and the relationship tabs are labelled by their associated object type's monogram and object type group.



Modifying any of the headers in rows 1-4 of the spreadsheet will cause an error when the template is uploaded.

3. On row 5, column A, under **OB1 Ext Ref ID**, enter the external reference ID of the object that has the relationship saved to it.
4. On row 5, column C, under **OB2 Ext Ref ID**, enter the external reference ID of the object the relationship will pull data from.



Object Name in columns B and D is for your reference only.

5. Repeat the steps above to continue adding more relationship data to the spreadsheet, as needed. To import data into a different relationship, select the appropriate worksheet.

	A	B	C	D
1	Relationship ID	Object Type ID	Object Type ID	
2	Company-BusinessUnit	Company	BusinessUnit	
3	Company	(optional)	Business Unit	(optional)
4	OB1 Ext Ref ID	Object Name	OB2 Ext Ref ID	Object Name
5	COMP-1	ABC Corp.	BU-1	Asia
6				

Mapping a Company object to a Business Unit object.

6. Save your changes.
7. [Upload the spreadsheet](#) to complete the import.

Enter Updated Object Data on the Import Template

You can update existing object data through **Data Import** a by adding field values, assigning users to roles, or moving an object to a specific workflow state. Updating object data requires the object's **external reference ID**, which you can obtain from a previous import template, via the [Audit Trail](#) feature, or by adding the **External Reference ID** data type to a [report table](#) .



Blank values in the spreadsheet are ignored when uploaded into Core. Therefore, you cannot delete existing property, field, role, or workflow data by entering a blank value in the spreadsheet.

To enter updated object data in the import template:

1. Open the data import template. See the [Create an Import Template](#) article for instructions on generating this spreadsheet.
2. Click an object type tab, which are highlighted, to select its worksheet (e.g. Risk). Relationship tabs are labelled with the monogram of the object type they're saved on and their object type group (e.g. R - Control). Tabs are generated in alphabetical order. See [Enter Relationship Data on the Import Spreadsheet](#) for instructions on mapping relationship objects.

Risk	R - Control	R - Incident Type	R - Issue	R - Indicator	Risk Category
------	-------------	-------------------	-----------	---------------	---------------

Tabs on an import template spreadsheet. Object type tabs are highlighted (e.g. Risk and Risk Category) and the relationship tabs are labelled by their associated object type's monogram and object type group.



Modifying any of the headers in rows 1-4 of the spreadsheet will cause an error when the template is uploaded.

3. On row 5, column a, below **External Ref ID**, enter the object's external reference ID.



You can get the object's external reference ID from a previous import spreadsheet used to import the object, through a spreadsheet generated by the [Audit Trail](#) feature, or by adding the **External Reference ID** data type to a [report table](#) .

4. Enter the data you want to import under the appropriate column. If data field, role, or workflow data already exists on the object, this data will be overwritten by the imported data. See the [Enter New Object Data](#) article for more information on entering field, role, or workflow data in the spreadsheet.
5. Save your changes.
6. [Upload the spreadsheet](#) .

Import Using External Reference IDs

If needed, you can import object and relationship data using an object type's External Reference Object Type ID or a relationship's External Reference Relationship Type ID (instead of the Object Type ID or Relationship ID). This feature is useful when importing objects into multiple organizations that were recently imported through [Org Manager](#) as the object type and relationships retain their external reference IDs and already exist in the imported org, allowing you to use the same import spreadsheet for more than one duplicate organization.



When importing data, you may use only the object type and relationship IDs **OR** external reference IDs in each spreadsheet.

To import data using object type/relationship type External Reference IDs:

1. Obtain the object type ID for the object type or the object type where the relationship is saved. See steps 1-3 in the [Enter New Object Data](#) section for information on obtaining the object type ID.
2. Click the  icon in the top bar > **Swagger Docs** in the **Tools** section.
3. Click **ObjectType** to display the **Object Service API** page.
4. To obtain the External Reference Object Type ID for an object type:
 - a. From the **Object Service API** page, click **GET** next to **/objectType/{id}**.

objectType			Show/Hide	List Operations	Expand Operations
GET	/objectType	Retrieve all objectType, optionally limited by ids			
POST	/objectType	Add an objectType			
DELETE	/objectType/{id}	Delete an objectType			
GET	/objectType/{id}	Load a specific objectType			
PUT	/objectType/{id}	Update an objectType			
GET	/objectType/{id}/count	Load the count of a specific objectType			
GET	/objectType/nextObjectId/{id}	Get the next objectId for specific objectType			

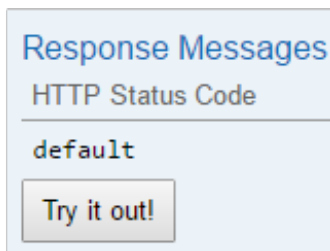
The objectType section of the Object Service API page.

- b. In the **id** field, under **Parameters**, enter the object type ID.

Parameters		
Parameter	Value	Description
id	1536	

The id field in the Parameters section.

- c. Click **Try it out!** in the **Response Messages** section.



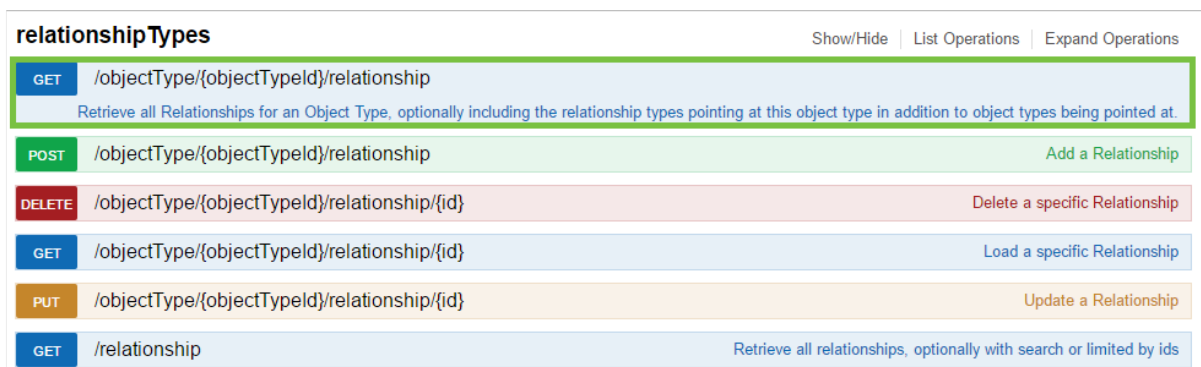
The Try it out! button in the Response Messages section.

- d. Scroll down to the **Response Body** section to retrieve the object type's External Reference Object Type ID, which is the value displayed beside **externalRefID**.



The object type's external reference ID in the Response Body section.

5. To obtain the External Reference Relationship Type ID for a relationship:
- From the **Object Service API** page, click **relationshipTypes**.
 - Click **GET** next to **/objectType/{objectTypeID}/relationship**.



The relationshipTypes section of the Object Service API page.

- c. In the **objectTypeId** field, under **Parameters**, enter the object type ID for the object type where the relationship is saved.

Parameters		
Parameter	Value	Description
objectTypeId	1536	
inverse	▼	

The objectTypeId field in the Parameters section.

- d. Click **Try it out!** in the **Response Messages** section.

Response Messages
HTTP Status Code
default
Try it out!

*The Try it out! button in the
Response Messages
section.*

- e. Scroll down to the **Response Body** section, which displays all relationships saved to the object type selected. You can identify each relationship by the entries next to **"name"** and **"longName"** (if a long name was specified) in Response Body. The value displayed beside **externalRefId** is the **External Reference Relationship Type ID**.

Response Body
<pre>{ "outgoing": [{ "id": 2806, "name": "People Involved", "longName": "", "referenceName": "", "objectTypeId": 1536, "objectTypeGroupId": 1147, "maximumAllowedEdges": 0, "created": "2016-10-12T14:27:12.540Z", "modified": null, "org": 114, "externalRefId": "f29b833a-1362-4fc0-b8e8-bcd15fe84abc" },], }</pre>

The Response Body section which displays all the relationships saved to the selected object type.

6. If importing objects, on an object type worksheet in the data import spreadsheet, enter the External Reference Object Type ID below **Object Type ID** on row 2, column A. If importing relationships, enter the External Reference Relationship Type ID below **Relationship ID** on row 2, column A on a relationship worksheet.

	A	B
1	Object Type ID	
2	70388ab9-7beb-46c2-912d-4625ce4e119e	
3		
4	External Ref ID	Name
5	PER-7	Phyllis Meyer
6	PER-8	Johnny Kelly
7	PER-9	Jonathan Evans

Entering the External Reference Object Type ID below the Object Type ID cell in the data import spreadsheet.



You cannot use the symbol when entering External Reference IDs to create new objects, as clone data creation is not supported. For example, an External Ref ID of PER-7 is acceptable, however, PER-7:1 will produce an error.

7. Continue entering [object](#) or [relationship](#) data as needed.
8. [Upload the spreadsheet](#).

Upload the Import Template

Before completing the import, you must ensure the import template has been generated and the object and relationship data has been entered correctly on the appropriate worksheet. See the following articles for more information:

- [Create an Import Template](#)
- [Enter New Object Data on the Import Template](#)
- [Enter Relationship Data on the Import Template](#)
- [Enter Updated Object Data on the Import Template](#)



Data Import allows spreadsheets with up to 15 MB of data to be uploaded.

Data Import

Drag and drop (or browse for) a Core-configured Excel data import file.

Drag file here or click to upload

One file can be uploaded at a time. Date field values will be imported in UTC timezone

☐ Verify file only

Identifier type

Object Type External Reference ID

The importer supports using Object Type External Reference IDs or Object Type IDs

The Data Import page.

To upload the template into Core:



1. Click the  icon in the top bar > **Data Import** in the **Tools** section.
2. From the **Identifier type** dropdown menu, select either **Object Type External Reference ID** (if you've entered the [External Reference](#) Object Type IDs and/or the External Reference Relationship Type IDs on the spreadsheet) or **Object ID** (if you've entered the object type IDs and/or relationship IDs on the spreadsheet).



When importing data, you may use only the object type and relationship IDs **OR** external reference IDs in each spreadsheet.

3. Drag and drop the file to the upload area or click the area to locate and open the file for upload.

Select the **Verify file only** checkbox before uploading the file to check



the data has been entered correctly. If you use this feature, you will need to deselect the checkbox then re-upload the file (provided the information is valid) to complete the import.

4. If needed, correct any errors on the spreadsheet, save your changes, then re-upload the file.

Drag and drop (or browse for) a Core-configured Excel data import file.

 data import.xlsx ×

Drag file here or click to upload

⚠ There were problems with the file:

- no or invalid object type id provided on sheet OBJECT NAME 1
- cannot find object type 70388 on sheet OBJECT NAME 22
- cannot find object type 4 on sheet OBJECT NAME 2
- source ref INC-14 not a valid external reference id -- dest was PER-7
- source ref INC-14 not a valid external reference id -- dest was PER-8
- source ref INC-14 not a valid external reference id -- dest was PER-9
- invalid relationship type id 1

One file can be uploaded at a time. Date field values will be imported in UTC timezone

☐ Verify file only

Identifier type

Object ID

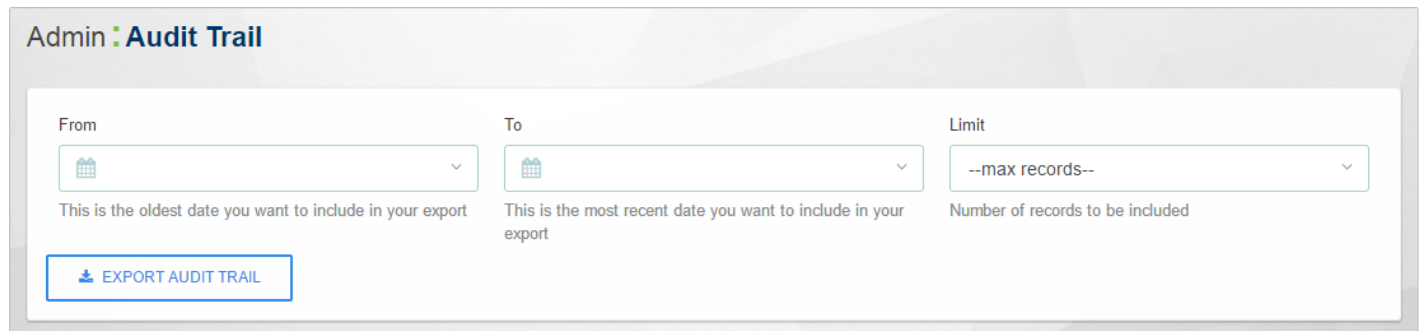
The import supports using External References as well as Object IDs

An uploaded spreadsheet with errors. Errors in the spreadsheet will prevent successful import whether or not you've selected the Verify file only checkbox.

When import is successful, a confirmation message will be displayed. If you're importing a large amount of data or data that includes role assignments, the import process may not complete immediately, depending on the amount of data, the complexity of the role's permissions, and/or the number of roles being assigned. In this case, a message will be displayed when the import is in progress and when it's completed.

Audit Trail Overview

The **Audit Trail** feature creates an Excel spreadsheet that you can download that lists all the changes made to objects within a selected timeframe.



The Audit Trail feature.

The exported file displays information under the following columns:

- **Date and Time:** When the object was modified.
- **Unique ID:** The ID automatically assigned to the object by CORE to identify it throughout the organization.
- **Object ID:** The ID automatically assigned by the user to the object.
- **Object Name:** The object's **Name** property.
- **Action:** The type of change that was made on the object (e.g. Update Object, Add Object, Remove Relationship, etc.).
- **Applied to:** The element (property, field, formula, relationship, etc.) to which the changes were made.
- **Value:** The actual data entered into the element.
- **JSON:** This information may be used for additional data analysis. Contact [Resolver](#) for more information.
- **By User:** The user who made the changes. If the user was being [impersonated](#) by an administrator at the time changes were made, this field will show "[User Name] impersonated by [Administrator Name]."
- **Object Type ID:** The ID automatically assigned to the object type.
- **External Reference ID:** A reference ID automatically assigned to the object. This ID can be used to import data using the [Data Import](#) feature.



When **Evaluation** appears in the **Action** and **Applied to** columns, it indicates there was a change to a field value.

	A	B	C	D	E	F	G	H	I	J	K	L	M	N
1	Date and Time	Unique Id	Object Id	Object Name	Action	Applied to	Value	JSON	By User	Object Type	Object Type	External Reference Id		
2	Tue Nov 22	15	78	IC/Burglary 2016/1	Add Relationship	Location	Montreal	{'type':26; 'value':1536; 'roleid':4; 'id':86; 'na':Eva Luckett	Eva Luckett	1536	Incident	b71f5849-9047-4937-b514-3095dfea-9567-4ea7-879f		
3	Tue Nov 22	10	45	KD/Emergency 2016/1	Add Relationship	Location	Montreal	{'type':26; 'value':1536; 'roleid':4; 'id':86; 'na':Eva Luckett	Eva Luckett	1536	Incident	3095dfea-9567-4ea7-879f		
4	Tue Nov 22	10	45	KD/Emergency 2016/1	Remove Relationship	Location	Montreal	{'type':26; 'value':1536; 'roleid':4; 'id':86; 'na':Eva Luckett	Eva Luckett	1536	Incident	3095dfea-9567-4ea7-879f		
5	Tue Nov 22	19	84	KD/Lost 2016/1	Add Relationship	Location	Los Angeles	{'type':26; 'value':1536; 'roleid':4; 'id':86; 'na':Eva Luckett	Eva Luckett	1536	Incident	be3ba26c-afed-43e2-a6e6		
6	Tue Nov 22	19	84	KD/Lost 2016/1	Remove Relationship	Location	Montreal	{'type':26; 'value':1536; 'roleid':4; 'id':86; 'na':Eva Luckett	Irwin Cromb	1536	Incident	be3ba26c-afed-43e2-a6e6		
7	Mon Nov 21	8	42	KD/Lost 2016/1	Add User to Role	Role: Incident Creator	Hollie Peel	{'roleid':4; 'value':1536; 'id':86; 'na':Aaron Mah	Aaron Mah	1536	Incident	712009dd-86ed-46e6-be1f		
8	Fri Nov 18 2	8	42	KD/Lost 2016/1	Add Relationship	Location	Montreal	{'type':26; 'value':1536; 'roleid':4; 'id':86; 'na':Elias Graff	Elias Graff	1536	Incident	712009dd-86ed-46e6-be1f		
9	Fri Nov 18 2	8	42	KD/Lost 2016/1	Add Relationship	Location	Edmonton	{'type':26; 'value':1536; 'roleid':4; 'id':86; 'na':Eva Luckett	Eva Luckett	1536	Incident	712009dd-86ed-46e6-be1f		
10	Fri Nov 18 2	6	86	Honda Fit	Add Object	Object: Vehicle		{'id':86; 'na':Eva Luckett	Eva Luckett	1620	Vehicle	e0c4ab56-a6c6-4fb2-8be1		
11	Fri Nov 18 2	16	79	HP/Health Issue 2016/1	Add Relationship	Vehicles Involved	Honda Fit	{'type':26; 'value':1536; 'roleid':4; 'id':86; 'na':Hollie Peel	Hollie Peel	1536	Incident	9ca432be-e18d-4c63-b34d		
12	Fri Nov 18 2	17	81	SB/Lost 2016/0	Add Relationship	Vehicles Involved	Mazda 3	{'type':26; 'value':1536; 'roleid':4; 'id':86; 'na':Wendy Mar	Wendy Mar	1536	Incident	85917424-1657-4c89-8412		
13	Fri Nov 18 2	9	44	KD/Found 2016/1	Remove Relationship	Vehicles Involved	Mazda 3	{'type':26; 'value':1536; 'roleid':4; 'id':86; 'na':Hollie Peel	Hollie Peel	1536	Incident	16e61344-1d70-4a8a-b91d		
14	Fri Nov 18 2	9	44	KD/Found 2016/1	Add Relationship	Vehicles Involved	Toyota Yaris	{'type':26; 'value':1536; 'roleid':4; 'id':86; 'na':Tracie Bord	Tracie Bord	1536	Incident	16e61344-1d70-4a8a-b91d		
15	Fri Nov 18 2	5	85	Toyota Yaris	Add Object	Object: Vehicle		{'id':85; 'na':Eva Luckett	Eva Luckett	1620	Vehicle	1e0c16d0-3816-468a-a29f		
16	Fri Nov 18 2	16	79	HP/Health Issue 2016/1	Update Evaluation	Evaluation: Time Spent	7	{'evaluation':7; 'value':1536; 'roleid':4; 'id':86; 'na':Kevin Darde	Kevin Darde	1536	Incident	9ca432be-e18d-4c63-b34d		
17	Fri Nov 18 2	16	79	HP/Health Issue 2016/1	Update Evaluation	Evaluation: Time Spent	77	{'evaluation':77; 'value':1536; 'roleid':4; 'id':86; 'na':Kevin Darde	Kevin Darde	1536	Incident	9ca432be-e18d-4c63-b34d		
18	Fri Nov 18 2	16	79	HP/Health Issue 2016/1	Update Evaluation	Evaluation: Time Spent	7	{'evaluation':7; 'value':1536; 'roleid':4; 'id':86; 'na':Kevin Darde	Kevin Darde	1536	Incident	9ca432be-e18d-4c63-b34d		
19	Fri Nov 18 2	17	81	SB/Lost 2016/0	Update Evaluation	Evaluation: Time Spent	2.5	{'evaluation':2.5; 'value':1536; 'roleid':4; 'id':86; 'na':Kevin Darde	Kevin Darde	1536	Incident	85917424-1657-4c89-8412		
20	Fri Nov 18 2	2	23	HP/Accident 2016/1	Update Evaluation	Evaluation: Time Spent	3	{'evaluation':3; 'value':1536; 'roleid':4; 'id':86; 'na':Kevin Darde	Kevin Darde	1536	Incident	2e4e8ccf-72fd-4dbf-b6fd		
21	Fri Nov 18 2	19	84	KD/Lost 2016/1	Add Relationship	Location	Montreal	{'type':26; 'value':1536; 'roleid':4; 'id':86; 'na':Wendy Mar	Wendy Mar	1536	Incident	be3ba26c-afed-43e2-a6e6		
22	Fri Nov 18 2	19	84	KD/Lost 2016/1	Remove Relationship	Location	Toronto	{'type':26; 'value':1536; 'roleid':4; 'id':86; 'na':Sheba Boud	Sheba Boud	1536	Incident	be3ba26c-afed-43e2-a6e6		
23	Fri Nov 18 2	19	84	KD/Lost 2016/1	Add Relationship	Location	Toronto	{'type':26; 'value':1536; 'roleid':4; 'id':86; 'na':Kevin Darde	Kevin Darde	1536	Incident	be3ba26c-afed-43e2-a6e6		
24	Fri Nov 18 2	19	84	KD/Lost 2016/1	Add User to Role	Role: Incident Creator	Hollie Peel	{'roleid':4; 'value':1536; 'id':86; 'na':Hollie Peel	Hollie Peel	1536	Incident	be3ba26c-afed-43e2-a6e6		

The spreadsheet generated from the Audit Trail feature.

Export an Audit Trail Spreadsheet

To export an audit trail spreadsheet:

- 1. Click the  icon in the top bar > **Audit Trail** in the **Tools** section.
- 2. Select a start date, end date, and time range from the **From** and **To** fields.

Admin : **Audit Trail**

From

 1 November 2016 8:10 : ▾

This is the oldest date you want to include in your export

 **EXPORT AUDIT TRAIL**

To

 | ▾

November 2016

<

TODAY

>

Sun	Mon	Tue	Wed	Thu	Fri	Sat
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

8

:

10

am

Limit

--max records-- ▾

included

Selecting a date range for the Audit Trail.

- 3. **Optional:** Select the maximum number of records you want to returned in the spreadsheet. Leaving this field with its default value of **--max records--** will return up to 1 million records.
- 4. Click **Export Audit Trail** to begin downloading the spreadsheet.

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✓ Export of Audit Trail in progress

From



1 November 2016 8:10 ▾

This is the oldest date you want to include in your export

To



16 November 2016 8:10 ▾

This is the most recent date you want to include in your export

Limit

1000 ▾

Number of records to be included



EXPORT AUDIT TRAIL

After clicking Export Audit Trail, a confirmation message is displayed and the file will begin downloading on your computer through your browser.

5. Click the file at the bottom of your browser to open it.

Languages Overview

Through the **Languages** feature, you can customize the text in Core's user interface and applications, fields, object types, etc. to display a language of your choosing. This is done by downloading an Excel spreadsheet that contains a list of the user interface text in the default language, adding the applicable translations for that text, then uploading the spreadsheet back into Core. When a user logs in with a default language on their browser that matches a configured translation, Core will automatically match their browser's default language. If a user's browser is displaying a language that is not configured, Core's default language of US English will display.

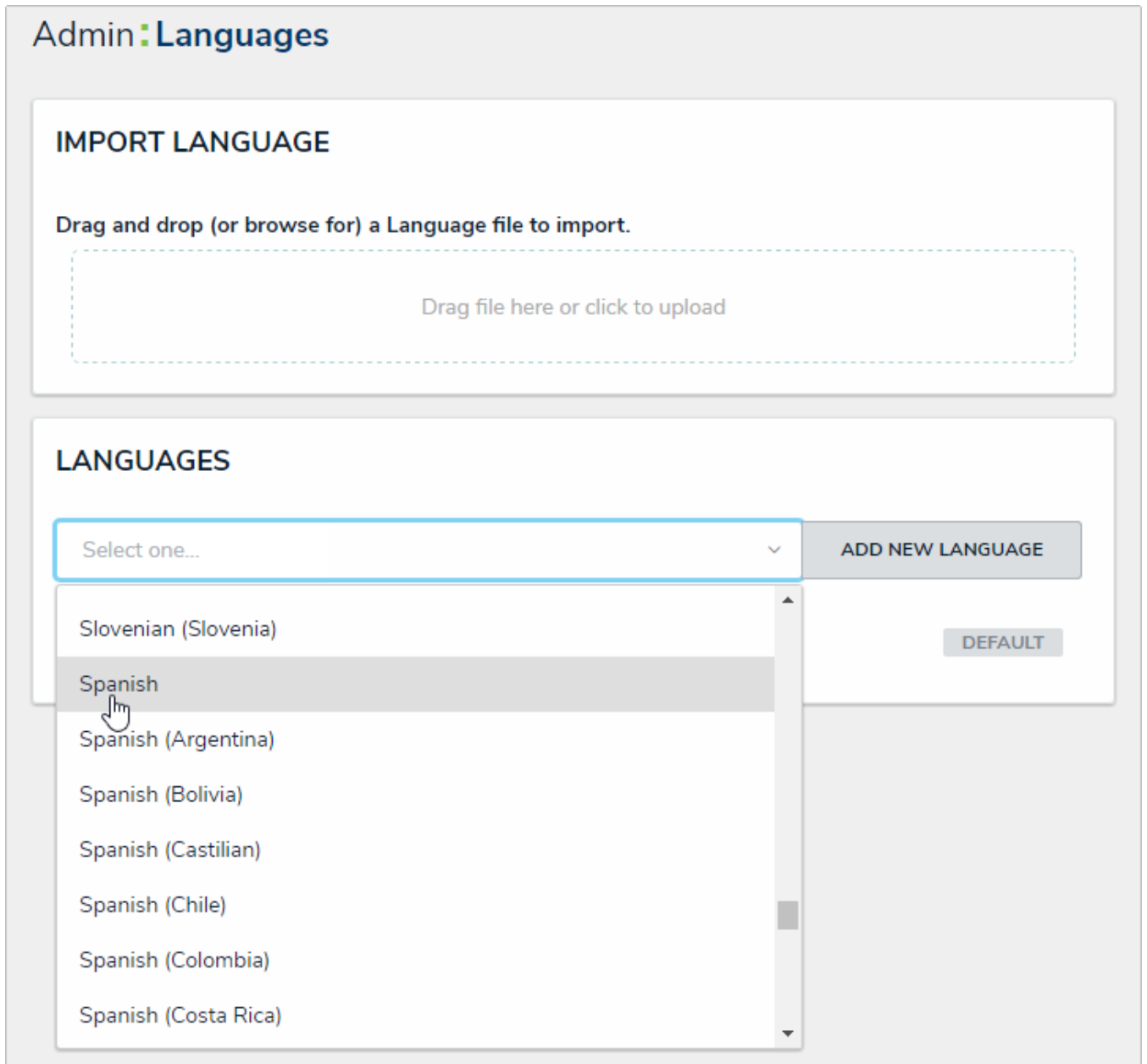
When using the **Languages** feature, note that:

- Translations are not pre-loaded or automatic. They must be manually entered into the spreadsheet.
- If a user's default language on their browser does not have a corresponding configured language in Core, the UI will display the default language (US English).
- You can select a pre-configured language in a [user's profile](#) to choose how the UI and applications will be translated. Note that the default language selected in a user's browser will take precedence.
- This feature currently only supports left to right languages.
- If your version of Core contains multiple organizations, translations must be configured for each individual org.
- Once a new language has been added to Core, it's not possible to delete it, however, you may edit the translations. Editing the default language through this feature is not currently supported.

Add a New Language

To add a new language into Core:

1. Click the  icon in the top bar > **Languages** in the **Tools** section.
2. Select a language from the dropdown menu in the **Languages** section.



The screenshot shows the 'Admin Languages' interface. At the top, there's a header 'Admin Languages'. Below it, there's a section titled 'IMPORT LANGUAGE' with the instruction 'Drag and drop (or browse for) a Language file to import.' and a dashed box for file upload. Below this is a section titled 'LANGUAGES'. It features a dropdown menu with the placeholder text 'Select one...'. The dropdown is open, showing a list of languages: 'Slovenian (Slovenia)', 'Spanish' (which is highlighted and has a mouse cursor over it), 'Spanish (Argentina)', 'Spanish (Bolivia)', 'Spanish (Castilian)', 'Spanish (Chile)', 'Spanish (Colombia)', and 'Spanish (Costa Rica)'. To the right of the dropdown is a button labeled 'ADD NEW LANGUAGE'. Below the dropdown, there's a 'DEFAULT' button.

Selecting a language from the dropdown menu.

3. Click **Add New Language**.
4. **Optional:** Click the  icon next to the language to edit its name.

LANGUAGES

Spanish

ADD NEW LANGUAGE

US English

DEFAULT

Spanish




A newly added language appearing in the Languages section.

- Click the  icon next the language to download the Excel spreadsheet.
- Once successfully downloaded, open the spreadsheet. The **Platform** tab at the bottom of the spreadsheet contains the text for the default user interface, while the **Applications** tab contains text for custom applications, fields, applications, etc. The **US English (en-US) DEFAULT** column in both worksheets (column E), displays the default text for each Core component.

	A	B	C	D	E	F
1	View	Component	Section	Key	US English (en-US) DEFAULT	Spanish (es)
2						
3	toast	objectupdatefailed	title	platform:toast:objectupdatefailed:title	Object was not saved successfully	
4						
5	app	role	placeholder	platform:app:role:placeholder	Select roles ...	
6		addroles		platform:app:addroles	Add Roles	
7						
8	confirmationbutton	title		platform:confirmationbutton:title	Please Confirm	
9		message		platform:confirmationbutton:message	Are you really sure that you want to do this?	
10						
11	session	expiryHeader		platform:session:expiryHeader	Session Expiry Notice	
12		expiryMessage		platform:session:expiryMessage	Your session will expire in {time}. Please refresh to continue working.	
13		refreshSession		platform:session:refreshSession	Refresh Session	
14						
15	rolepicker	label		platform:rolepicker:label	Role	
16		placeholder		platform:rolepicker:placeholder	Search for Roles	
17						
18	table	searchtable		platform:table:searchtable	Search Table...	

The languages spreadsheet.

- Using the text in the **US English (en-US) DEFAULT** column (column E) as a reference, enter the applicable translations in column F (titled after the language selected in steps 2-4). Enter the translations on the **Platforms** and/or **Applications** worksheet(s) as needed.

E	F	
US English (en-US) DEFAULT	Spanish (es)	
Object was not saved successfully	El objeto no se guardó correctamente	
Select roles ...	Seleccionar roles ...	
Add Roles	Añadir roles	
Please Confirm	Por favor confirmar	
Are you really sure that you want to do this?	¿Estás realmente seguro de que quieres hacer esto?	

Translations entered into the spreadsheet. Column E displays the text for the current labels in CORE and the corresponding translations are added to Column F.



The spreadsheet will not successfully upload if you remove any data from the **Key** (column D) section of the **Applications** worksheet or if data is entered in the empty rows that are used to separate each section on either worksheet.

8. Save the file at a location that's easily accessible.
9. Return to the **Languages** page in Core, then drag and drop or click the upload area in the **Import Languages** section to upload the spreadsheet.

IMPORT LANGUAGE

Drag and drop (or browse for) a Language file to import.

Drag file here or click to upload

The Import Language section where the spreadsheet with the translations is uploaded into CORE.

Supported Languages

Core currently supports the following languages when using the admin settings to translate the user interface text:

- Albanian
- Basque
- Basque (Spain)
- Belarusian
- Belarusian (Belarus)
- Bosnian (Bosnia and Herzegovina)
- Catalan
- Catalan (Spain)
- Croatian
- Croatian (Bosnia and Herzegovina)
- Croatian (Croatia)
- Czech
- Czech (Czech Republic)
- Danish
- Danish (Denmark)
- Dutch
- Dutch (Belgium)
- Dutch (Netherlands)
- English
- English (Australia)
- English (Belize)
- English (Canada)
- English (Caribbean)
- English (Ireland)
- English (Jamaica)
- English (New Zealand)
- English (Republic of the Philippines)
- English (South Africa)
- English (Trinidad and Tobago)
- English (United Kingdom)
- English (United States)
- English (Zimbabwe)
- Esperanto

- Estonian
- Estonian (Estonia)
- Faroese
- Faroese (Faroe Islands)
- Finnish
- Finnish (Finland)
- French
- French (Belgium)
- French (Canada)
- French (France)
- French (Luxembourg)
- French (Principality of Monaco)
- French (Switzerland)
- Galician
- Galician (Spain)
- German
- German (Austria)
- German (Germany)
- German (Liechtenstein)
- German (Luxembourg)
- German (Switzerland)
- Hungarian
- Hungarian (Hungary)
- Italian
- Italian (Italy)
- Italian (Switzerland)
- Latvian
- Latvian (Latvia)
- Lithuanian
- Lithuanian (Lithuania)
- Maltese
- Maltese (Malta)
- Maori
- Maori (New Zealand)
- Norwegian (Bokmål)
- Norwegian (Bokmål) (Norway)

- Norwegian (Nynorsk) (Norway)
- Polish
- Polish (Poland)
- Portuguese
- Portuguese (Brazil)
- Portuguese (Portugal)
- Quechua
- Quechua (Bolivia)
- Quechua (Ecuador)
- Quechua (Peru)
- Romanian
- Romanian (Romania)
- Serbian (Latin) (Bosnia and Herzegovina)
- Serbian (Latin) (Serbia and Montenegro)
- Slovak
- Slovak (Slovakia)
- Slovenian
- Slovenian (Slovenia)
- Spanish
- Spanish (Argentina)
- Spanish (Bolivia)
- Spanish (Castilian)
- Spanish (Chile)
- Spanish (Colombia)
- Spanish (Costa Rica)
- Spanish (Dominican Republic)
- Spanish (Ecuador)
- Spanish (El Salvador)
- Spanish (Guatemala)
- Spanish (Honduras)
- Spanish (Mexico)
- Spanish (Nicaragua)
- Spanish (Panama)
- Spanish (Paraguay)
- Spanish (Peru)
- Spanish (Puerto Rico)

- Spanish (Spain)
- Spanish (Uruguay)
- Spanish (Venezuela)
- Swedish
- Swedish (Finland)
- Swedish (Sweden)
- Tagalog
- Tagalog (Philippines)
- Turkish
- Turkish (Turkey)
- Welsh
- Welsh (United Kingdom)
- Xhosa
- Xhosa (South Africa)
- Zulu
- Zulu (South Africa)

Email Templates Overview

When the [Messaging](#) action has been created on a workflow transition, an email is sent to users within one or more selected roles once an object has transitioned to the next specified state. The contents of the email is based on the template selected when the action was created.

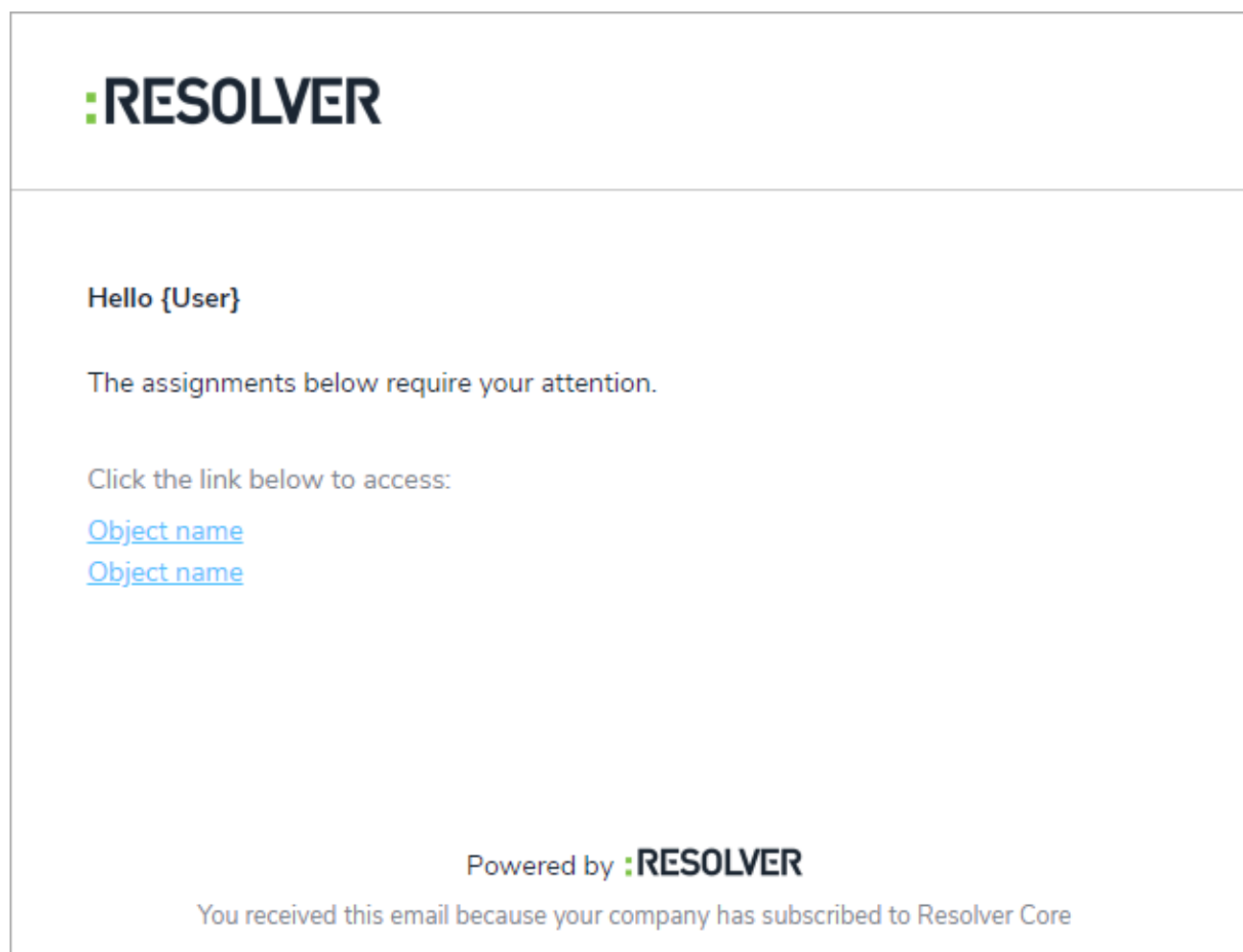
By default, each organization has the following templates:

- **Standard:** Advises users that there are one or more objects that require attention.
- **Assigned** Advises users that one or more objects have been assigned to them.

Through the **Email Templates** settings, administrators can create new templates or edit the default templates by applying the following customizations:

- Creating a new subject line and custom message in the body of the email;
- Inserting variables (fields or [properties](#)) in the subject and body to provide more information about the object(s);
- Applying [Markdown formatting](#) to any custom messages in the body of the email; and
- Replacing the Resolver logo with your company's logo.

Note that because the default templates (**Standard** or **Assigned**) can be edited, these templates' names and contents may vary.



A preview of the Assignment email template.

Email Template Variables

Email templates allow administrators to determine what information is sent to users when a [Messaging](#) workflow action is triggered. When creating or editing these templates, you can embed **variables**, which represent the data from an object's fields and/or [properties](#).

Fields and properties from all the object types in your organization can be added to an email template (both [custom](#) and [default](#)), but the information in those fields or properties are populated based on the object that triggered the email. For example, Risk 15 is an object with a high priority. When the email is triggered, the Name property is populated as Risk 15 and the Priority Field as High. When the low-priority object, Risk 20, triggers an email, the Name property is populated as Risk 20, and the Priority field as Low.

A new risk is created by Default User

 Resolver Notifications <noreply@resolver.com>

Monday, July 23, 2018 at 1:17 PM

[Show Details](#)



Hi [REDACTED]

The following risk has been created:

Date Created: 2018-07-23 17:16 (UTC)

Severity: High

Risk Name: Breach of data

Please, follow the link below to review the risk.

Click the link below to access

[Breach of data](#)

Powered by  RESOLVER

You received this email because your company has subscribed to Resolver Core

An email with variables as it appears to an end user. The highlighted text are populated email variables.

Supported Fields & Properties

The following fields and properties can be embedded in a template:

- All field types **except** [Attachments](#) and [Image Attachments](#) .
- Fields that do not contain any special characters. Only fields with alphanumeric characters (including spaces) are accepted.
- The following [properties](#) :
 - Name
 - Description
 - Unique ID
 - Created By
 - Created On
 - Modified By
 - Modified On

If a field is not linked to the same object type as the **Messaging** action or it is unlinked or deleted after it was embedded in the template, it will appear as **{Field Not Found}** in preview on the settings page and as **Not Specified** in any emails sent out to users. If a property or field doesn't contain a value, it will appear as **Not Specified** in the email.

Embedding Variables

To add a variable to a template, type + in the **Email Subject Line** or **Email Body** field, start typing the name of the field or property you wish to add, then click to add it to the template. If needed, you can also scroll through the list of available variables, then click one to add it to the template. The object type the field is linked to will appear to the right of the field's name in the search results. If a field is linked to more than one object type, it will appear in the search results once for each object type.

Note that only the value of the field or property is displayed in the template. The field or property name (e.g. Priority, Category, or Requirements) is not populated automatically. If you wish to include a title or any other information about the variable, it must be typed manually.

To delete a variable, use the **Backspace** key on your keyboard.

Email Subject Line ?

The name record requires your attention.

Email Body ?

Priority: +prio
 Category:
 Requirements:

Priority KEY RISK INDICATOR
 Priority SECURITY REQUIREMENTS ...
 Priority PRIVACY IMPACT ASSESSME...
 Priority KEY PERFORMANCE INDIC...

Basic Markdown Formatting

Embedding a variable in an email template. Fields that are linked to more than one object type appear in the search results multiple times.

Markdown Formatting

You can apply [Markdown formatting](#) to variables in the body of the email; however, any emphasis formatting (i.e. italic, bold, or strikethrough) requires that the variable is enclosed in spaces (e.g. * Text *).

Email Subject Line ?

The `name` record requires your attention.

Email Body ?

****Priority:**** `Priority`

****Category:**** `Category`

****Requirements:**** `Requirements`

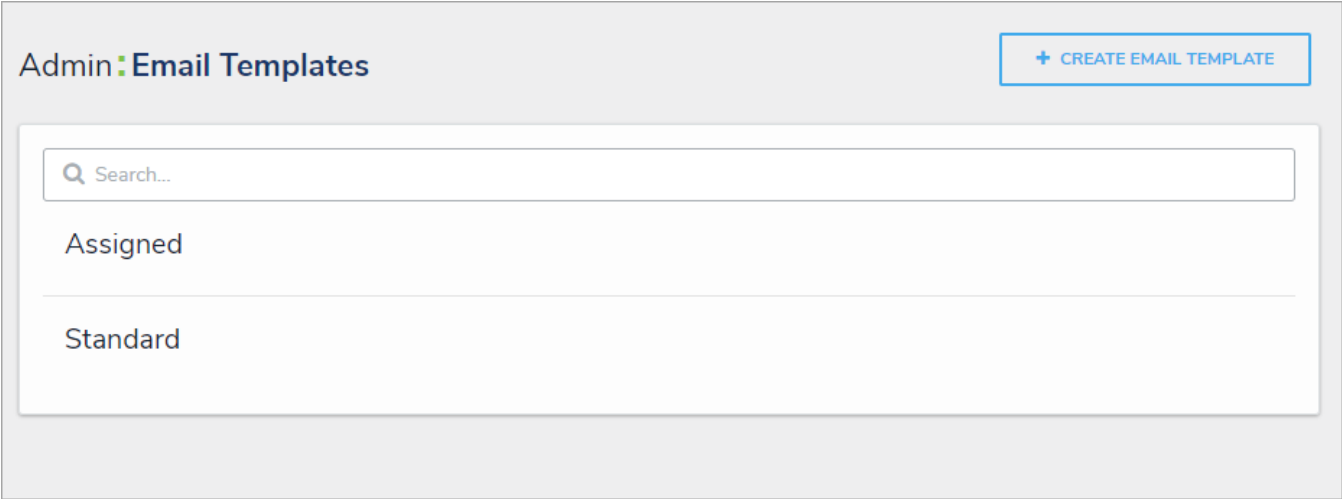
This record was ****** `createdBy` ****** on ****** `createdOn` ******.

Variables with Markdown formatting. Note the spaces around each variable that has emphasis formatting applied.

Create a New Custom Email Template

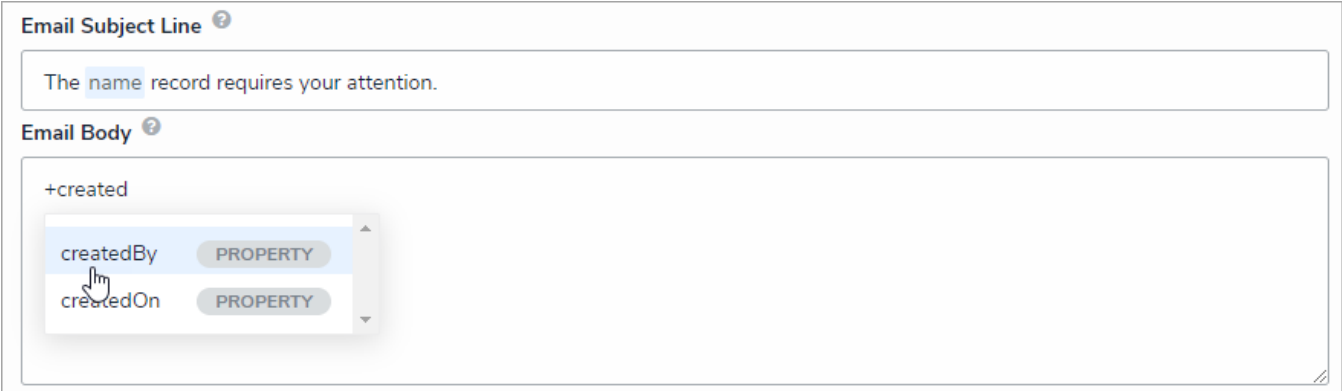
To create a new email template:

- 1. Click the  icon in the top bar > **Email Templates** in the **Other** section.
- 2. Click **Create Email Template** to display the **Create an Email Template** page. Note that all organizations have two default templates that will appear on this page. See [Edit the Default \(Standard or Assigned\) Templates](#) for more information.



The *Email Templates* settings page.

- 3. Enter a name for the template in the **Email Template Name** field, ensuring the name has not already been assigned to another template.
- 4. Enter a subject line in the **Email Subject Line** field. This line must be a minimum of 5 characters, which may include both letters and numbers. To automatically populate the name of your Resolver Core organization in this field using a variable, alone or with additional text, enter `{orgName}`. The `{orgName}` variable is case-sensitive.
- 5. Enter a custom message in the **Email Body** field. This message will appear above the links to the relevant objects and requires a minimum of 10 alphanumeric characters.
- 6. **Optional:** To embed a field or property variable, type `+` in the **Email Subject Line** or **Email Body** field, begin typing a field or property name to narrow down the search results, then click the variable to add it to the template. See the [Email Template Variables](#) article for more information on adding email variables, including which fields and properties are supported.



Variables in an email template.

- 7. **Optional:** Apply styling to a custom message or variable(s) in the **Email Body** field. To view basic styles, click the  icon in the **Basic Markdown Formatting** section. For more information applying formatting, see [Popular Markdown Styles](#).

Email Template Name

Review Required Template

Make sure to select a name for your template that does not exist.

Email Subject Line ?

The name record requires your attention.

Email Body ?

****Priority:**** Priority
****Category:**** Category
****Requirements:**** Requirements

 Contact **** createdBy **** for more information.

Basic Markdown Formatting

HEADERS	EMPHASIS	LISTS	
# h1	<i>*italic*</i>	<u>Unordered</u>	<u>Ordered</u>
## h2	**bold**	-Item 1	1. Red
	---strikethrough---	-Item 2	2. Green
		-Item 3	3. Blue

A new email template with Markdown formatting and variables.



To apply emphasis formatting (i.e. italic, bold, or strikethrough) to a variable, it must be enclosed in spaces (e.g. `* Text *`).

8. **Optional:** To display your company's logo in the top-left corner of the template, type or paste the public URL of the image in the **Logo** field. When inserting a custom logo in an email template, note that:

- The logo must be saved in JPEG, JPG, or PNG format.
- The image URL must end in .jpeg, .jpg, or .png. If a URL that does not end in one of these file extensions, the **Logo** field will display an error.
- The ideal dimensions of the logo is 210 x 56px. If the image is larger or smaller, it will be reduced or enlarged in the template.

Logo

https://www.yourcompany.com/logo.jpg

Upload your company's logo to a file storage website and then paste the public URL above

CANCEL **✓ CREATE**

The Logo field. If the URL does not end in a .jpg, .jpeg, or .png, an error will be displayed.

9. Click **Create** to save your changes and view the **Edit Email Template** page, where you can view a preview of the template, make changes to any of the fields, and view a list of [workflows](#) associated with the template in the **Email Template Workflow References** section.
10. If the email template is being used in a workflow, the object type's monogram, name, and workflow name will appear in

this section as a link (e.g. [Object Type Name] - Workflow [Workflow Name]). Clicking these links will display the related **Edit Workflow** page.



Hello {User}

Priority: {Value}
Category: {Value}
Requirements: {Value}

Contact {Value} for more information.

Click the link below to access:

[Object name](#)
[Object name](#)

Powered by  **RESOLVER**

You received this email because your company has subscribed to Resolver Core

Email Template Workflow References

This Email Template is linked to the following Workflows:

There are no Workflows linked to this Email Template

The Edit Email Template page displaying a preview of the email and associated workflows, if any.

Edit the Default (Standard or Assigned) Email Templates

By default, every organization has two email templates:

- **Standard:** Advises users that there are one or more objects that require attention.
- **Assigned:** Advises users that one or more objects have been assigned to them.

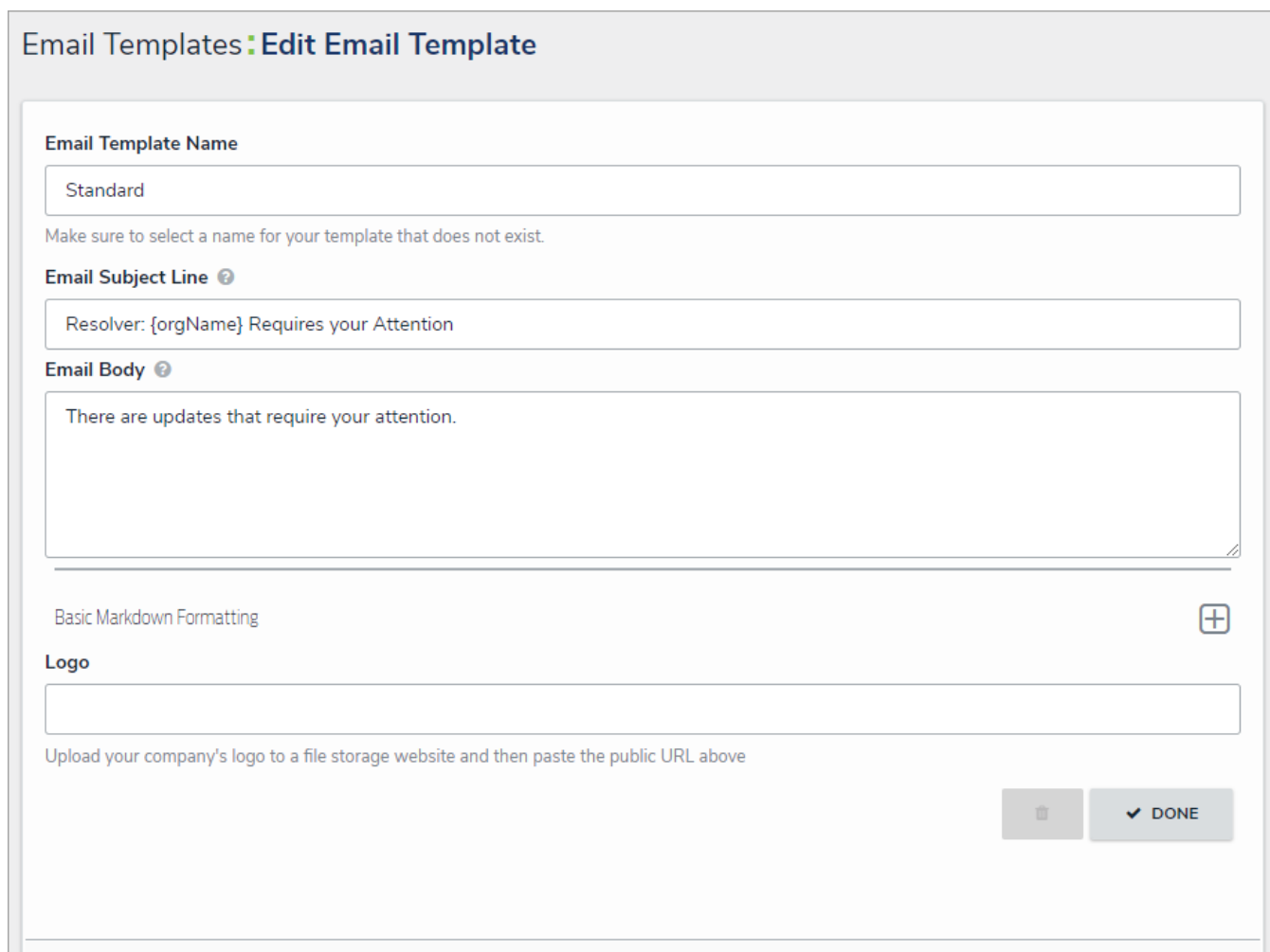
These templates cannot be deleted, however, all fields in the templates can be edited, including the template name.



Because each field in a template can be edited, the default templates in your organization may have been renamed.

To edit a default template:

1. Click the  icon in the top bar > **Email Templates** in the **Other** section.
2. Click the default template you want to edit (**Standard** or **Assigned**) to open the **Edit Email Template Page**.



The Edit Email Template page.

3. Enter a new or revised name for the template in the **Email Template Name** field, ensuring the name has not already been assigned to another template.
4. Enter a new or revised subject line in the **Email Subject Line** field. This line must be a minimum of 5 characters, which may

include both letters and numbers. To automatically populate the name of your Resolver Core organization in this field using a variable, alone or with additional text, enter **{orgName}**. This variable is case-sensitive.

5. Enter a new or revised message in the **Email Body** field. This message will appear above the links to the relevant objects and requires a minimum of 10 alphanumeric characters.
6. **Optional:** To embed a field or property variable, type **+** in the **Email Subject Line** or **Email Body** field, begin typing a field or property name to narrow down the search results, then click the variable to add it to the template. See the [Email Template Variables](#) article for more information on adding email variables, including which fields and properties are supported.



Email Subject Line ?

The {name} record requires your attention.

Email Body ?

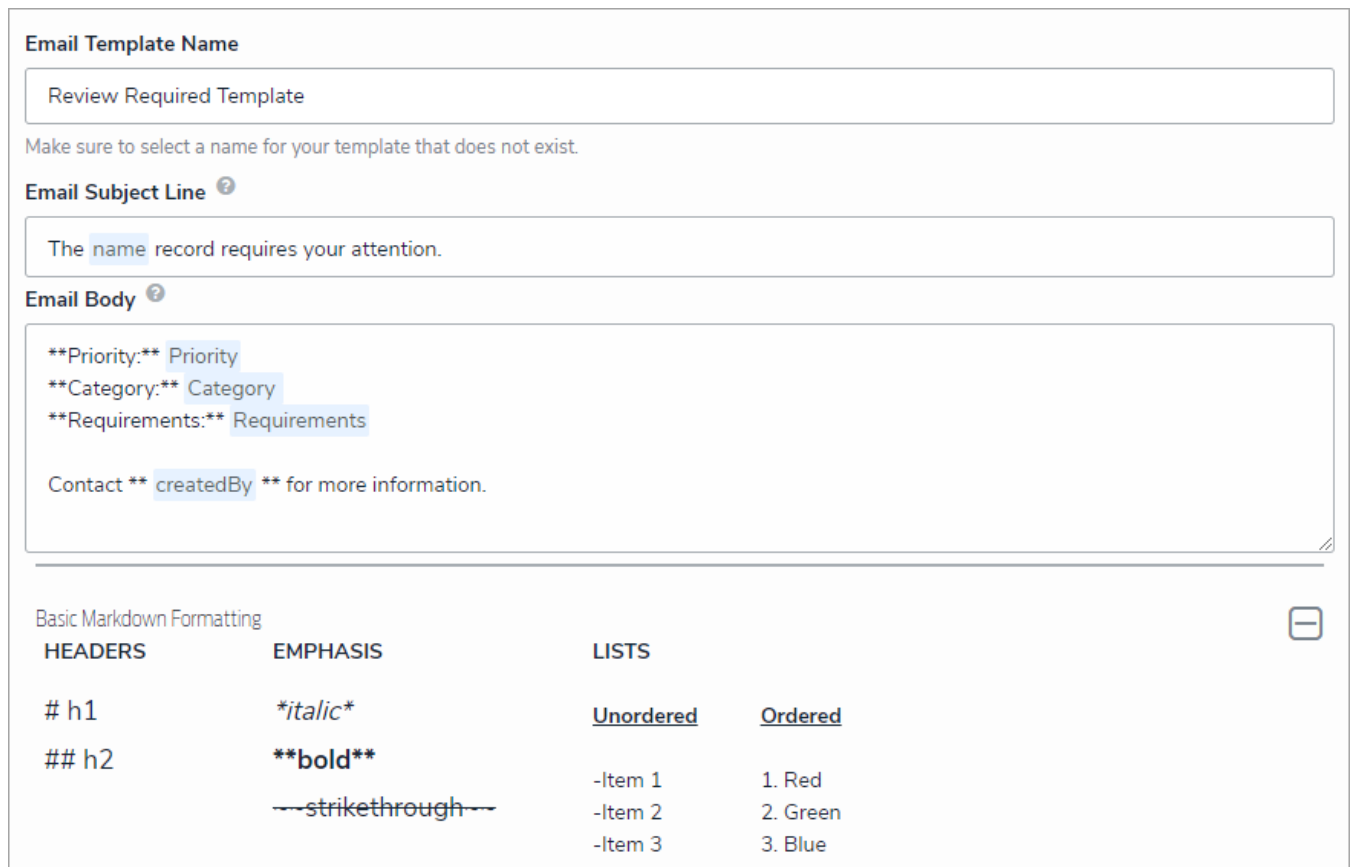
+created

createdBy PROPERTY

createdOn PROPERTY

Variables in an email template.

7. **Optional:** Apply styling to a custom message or variable(s) in the **Email Body** field. To view basic styles, click the  icon in the **Basic Markdown Formatting** section. For more information on applying formatting, see [Popular Markdown Styles](#).



Email Template Name

Review Required Template

Make sure to select a name for your template that does not exist.

Email Subject Line ?

The {name} record requires your attention.

Email Body ?

****Priority:**** {Priority}

****Category:**** {Category}

****Requirements:**** {Requirements}

Contact **** {createdBy} **** for more information.

Basic Markdown Formatting 

HEADERS	EMPHASIS	LISTS	
# h1	<i>*italic*</i>	<u>Unordered</u>	<u>Ordered</u>
## h2	**bold**	-Item 1	1. Red
	---strikethrough---	-Item 2	2. Green
		-Item 3	3. Blue

A new email template with Markdown formatting and variables.



To apply emphasis formatting (i.e. italic, bold, or strikethrough) to a variable, it must be enclosed in spaces (e.g. * Text *).

8. **Optional:** To display your company's logo in the top-left corner of the template, type or paste the public URL of the image in the **Logo** field. When inserting a custom logo in an email template, note that:

- The logo must be saved in JPEG, JPG, or PNG format.
- The image URL must end in .jpeg, .jpg, or .png. If a URL that does not end in one of these file extensions, the **Logo** field will display an error.
- The ideal dimensions of the logo is 210 x 56px. If the image is larger or smaller, it will be reduced or enlarged in the template.

Logo

Upload your company's logo to a file storage website and then paste the public URL above

CANCEL ✓ CREATE

The Logo field. If the URL does not end in a .jpg, .jpeg, or .png, an error will be displayed.

9. If the email template is being used in a workflow, the object type's monogram, name, and workflow name will appear in this section as a link (e.g. [Object Type Name] - Workflow [Workflow Name]). Clicking these links will display the related **Edit Workflow** page.



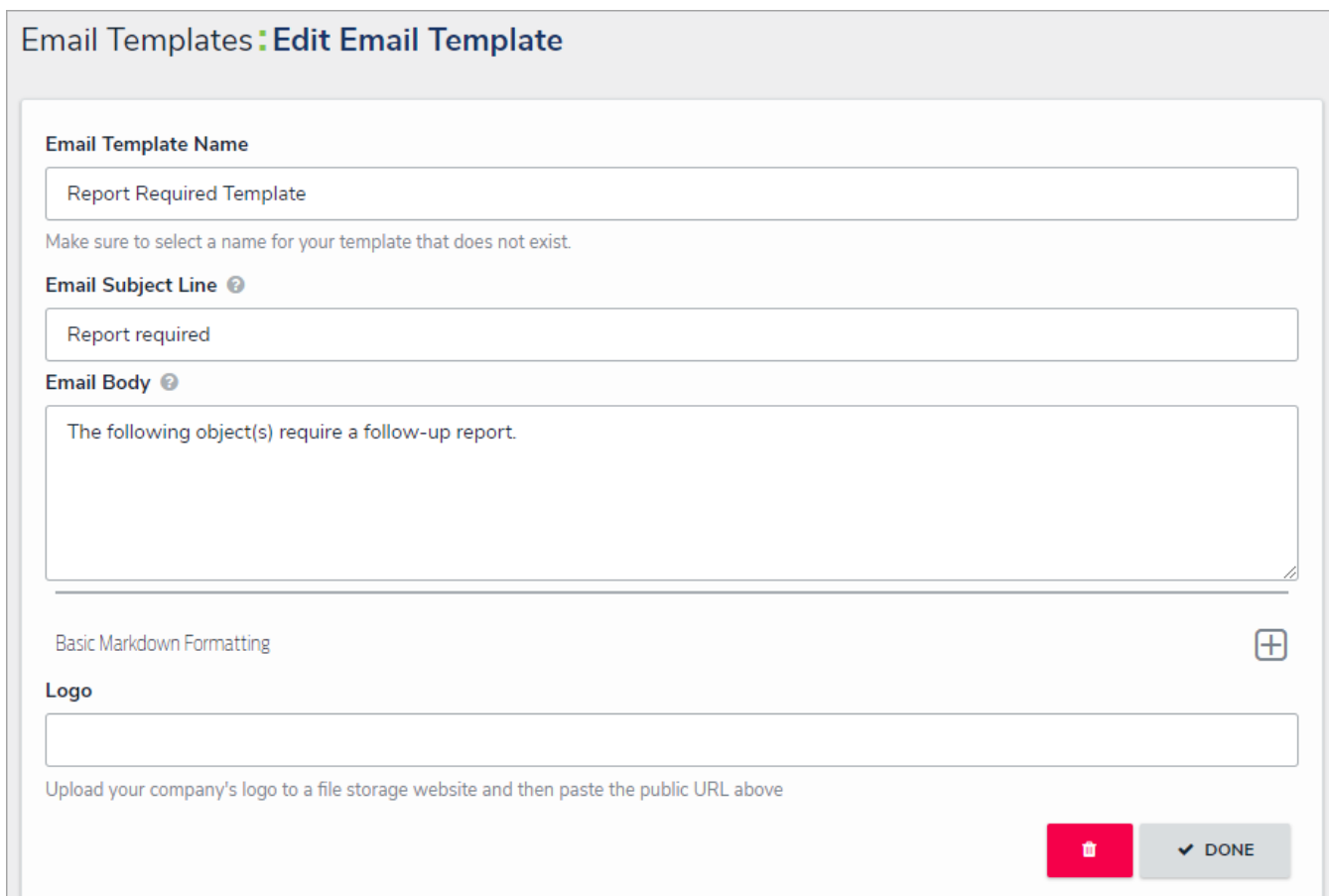
Default templates cannot be deleted.

Edit or Delete a Custom Email Template

A custom email template is any template that is **not** a [default template](#) (**Standard** or **Assigned**). Both custom and default templates can be edited, but only custom templates can be deleted, provided they are not currently selected in a [Messaging](#) action in a workflow.

To edit or delete a custom email template:

1. Click the  icon in the top bar > **Email Templates** in the **Other** section.
2. Click the template you want to edit to open the **Edit Email Template Page**.



The Edit Email Template page for a custom template. For default templates, the trash can (delete) icon is grayed out.

3. Enter a new or revised name for the template in the **Email Template Name** field, ensuring the name has not already been assigned to another template.
4. Enter a new or revised subject line in the **Email Subject Line** field. This line must be a minimum of 5 characters, which may include both letters and numbers. To automatically populate the name of your Resolver Core organization in this field using a variable, alone or with additional text, enter **{orgName}**. This variable is case-sensitive.
5. Enter a new or revised message in the **Email Body** field. This message will appear above the links to the relevant objects and requires a minimum of 10 alphanumeric characters.
6. **Optional:** To embed a field or property variable, type **+** in the **Email Subject Line** or **Email Body** field, begin typing a field or property name to narrow down the search results, then click the variable to add it to the template. See the [Email Template Variables](#) article for more information on adding email variables, including which fields and properties are supported.
7. **Optional:** Apply styling to the custom message or variable(s) in the **Email Body** field. To view basic styles, click the 

icon in the **Basic Markdown Formatting** section. For more information on Markdown, on applying styles, see [Popular Markdown Styles](#).



To apply emphasis formatting (i.e. italic, bold, or strikethrough) to a variable, it must be enclosed in spaces (e.g. * Text *).

8. **Optional:** To display your company's logo in the top-left corner of the template, type or paste the URL where the image is uploaded in the **Logo** field. When inserting a custom logo in an email template, note that:
 - The logo must be saved in JPEG, JPG, or PNG format.
 - The image URL must end in .jpeg, .jpg, or .png. If a URL that does not end in one of these file extensions, the **Logo** field will display an error.
 - The ideal dimensions of the logo is 210 x 56px. If the image is larger or smaller, it will be reduced or enlarged in the template.
9. To delete the template, click the  icon, then **Yes** to confirm. If this icon is grayed out, the template is either a [default template](#) or is currently selected in a workflow action.
10. To review view a list of workflows the template is currently associated with, see the **Email Template Workflow Reference** section at the bottom of the page. If the email template is being used in a workflow, the object type's monogram, name, and workflow name will appear in this section as a link (e.g. **[Object Type Name] - Workflow [Workflow Name]**). Clicking these links will display the related **Edit Workflow** page.

Anonymous Login Overview

The **Anonymous Login** feature allows administrators to use a single account to grant multiple users limited access to Core. This is done by generating a URL that will display only the form/activity selected in the settings, without requiring login credentials. This feature is useful for organizations that occasionally require non-employees or ground-level employees to access Core and/or anonymously create or edit data.

Because all changes made while using Anonymous Login is captured in the [Audit Trail](#) , before creating an anonymous login URL, administrators must first create a non-administrative [user account](#) and assign that account to a [role](#) that will have access to the object type(s) and activity (if applicable) that have been selected in the anonymous login settings.

Anonymous Login : New Anonymous URL

Name

Web Portal

Description

User

Portal User

Type

Activity

Application

Incident Reporting

Activity

Report an Incident

Login Url

https://[redacted].resolver.com/go/2750e12f81812e422532d24a2ffce9963aeb737a6

REGENERATE

DONE

The Anonymous Login feature.

By creating an anonymous login URL, you are accepting the Terms of Service on behalf of the users who will be accessing the link.

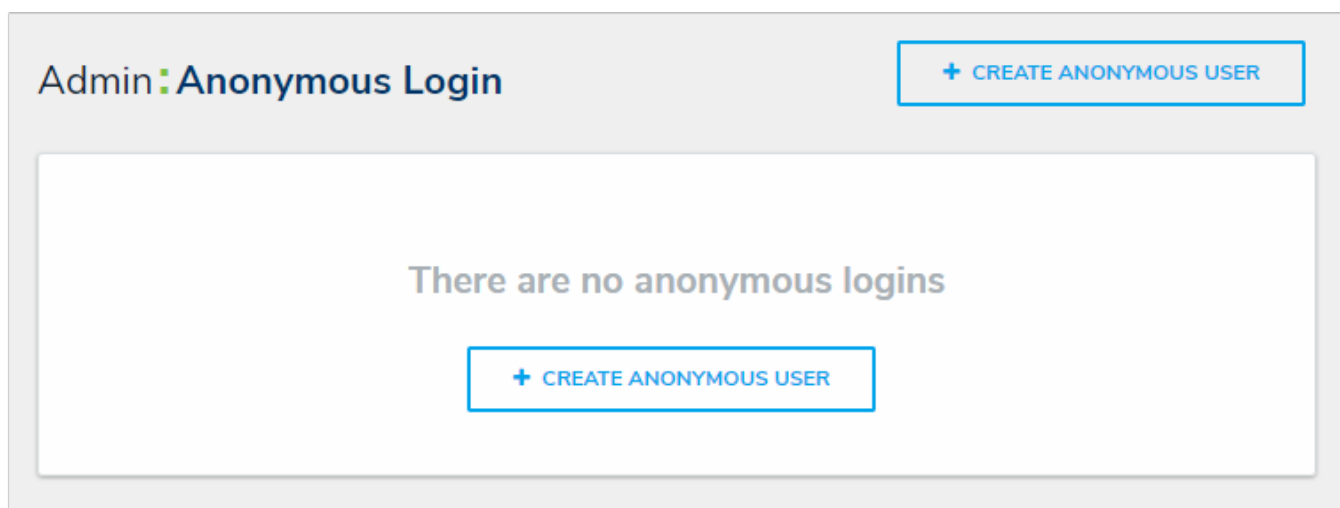
© Resolver Inc.

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Create an Anonymous Login

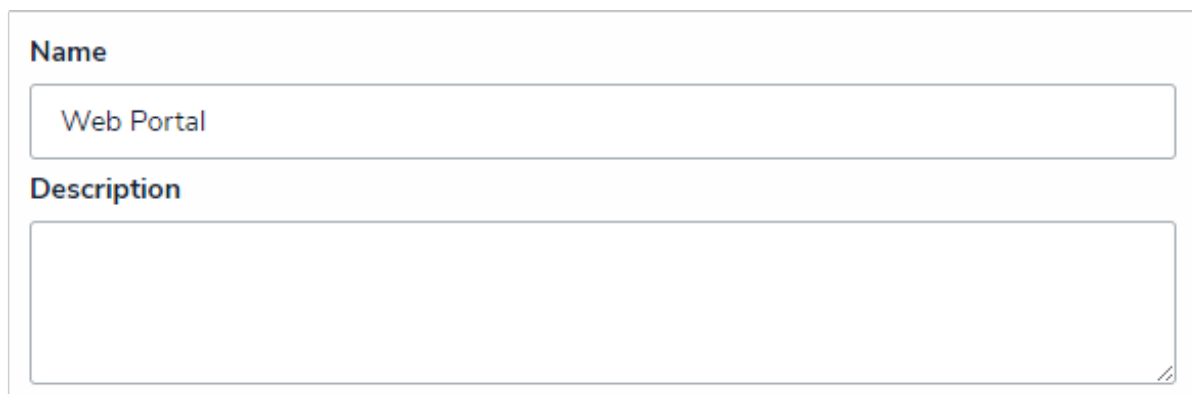
To create an anonymous user and login URL:

1. Create a non-administrative [user account](#) for the login, then assign it to a [role](#) with access to the appropriate object type(s) and activity.
2. Click the  icon in the top bar > **Anonymous Login** in the **Other** section.
3. Click **Create Anonymous User**.



The Anonymous Login page.

4. Enter a name for the login in the **Name** field.



The Name and Description fields of a new anonymous login.

5. **Optional:** Enter a description of the login in the **Description** field. This description will appear below the login's name on the **Anonymous Login** page.
6. Select the non-administrative account created in step 1 from the **User** dropdown menu.
7. Select either **Form** (to display a configurable form only) or **Activity** (to display the actions and views within an activity) from the **Type** dropdown menu:
 - If you selected **Form**:
 - a. Select an object type from the **Object Type** dropdown menu.

- b. Select a configurable form from the **Form** dropdown menu.

Name

Description

User

Type

ObjectType

Form

CANCEL

✓ CREATE

A new Form anonymous login.

- If you selected **Activity**:
 - a. Select an application from the **Application** dropdown menu.
 - b. Select an activity from the **Activity** dropdown menu.

Name

Web Portal

Description

User

Portal User

Type

Activity

Application

Incident Reporting

Activity

Report an Incident

CANCEL **✓ CREATE**

A new Activity anonymous login.

- Click **Create** to save your changes and generate the anonymous login link in the **Login Url** field.

Login Url 

[https://\[redacted\]resolver.com/go/c3f30b68f7138689b2c08dd2](https://[redacted]resolver.com/go/c3f30b68f7138689b2c08dd2) **REGENERATE**

The Login URL displaying the anonymous login URL. This field is read only, but you can copy the link to your clipboard.

- To share the link, select the it in the **Login Url** field, then copy it to your clipboard to paste into an email, document, etc.
- If the URL needs to be regenerated for security reasons, click **Regenerate** to create a new link.



With the exception of the **Name** and **Description** fields, editing an existing anonymous login will require a new **Login Url** link to be generated.

Edit or Delete an Anonymous Login

To edit or delete an anonymous login:

1. Click the  icon in the top bar > **Anonymous Login** in the **Other** section.
2. Click the anonymous login you wish to edit.
3. Make changes to the fields as required.
4. If necessary, click **Regenerate** to create a new link.



With the exception of the **Name** and **Description** fields, editing an existing anonymous login will require that a new **Login Url** link is generated.

5. To delete the anonymous login, click , then **Yes** to confirm.
6. Click **Done** when finished.

Custom Logo Overview

It's possible to replace the Resolver logo and embed a custom logo in the left navigation menu.

The screenshot displays the Resolver application interface. On the left, a dark blue navigation menu features a custom logo 'Company ABC' at the top. Below the logo, the menu lists several categories: 'Home', 'Employee Portal', 'Compliance', 'Incidents', 'Vendor', and 'Administration'. The 'Compliance' category is expanded, showing sub-items like 'Applicability Assessment', 'Control Documentation', 'Control Assessment', 'Remediation', 'Legislative Change Monitoring', 'Reports', and 'Library'. The main content area is titled 'Requirement Review' and contains an 'Applicability Assessment' form. The form includes fields for 'Name' (Service Contract Labor Standards Act/Fair Labor Standards Act), 'Jurisdiction' (a dropdown menu with a 'CREATE NEW' button), 'Date created' and 'Effective date' (calendar pickers), 'Description' (a text area with a sample paragraph about federal law requirements), 'Requirement owner' (a dropdown menu), 'Category' (a dropdown menu with 'AML Reporting' selected), and 'Evidence' (a file upload area showing 'book_of_regulations.pdf').

An example of a custom logo in the left navigation menu.

For a logo image to be compatible, it must be approximately:

- 15:4 ratio;
- 210 x 56px at 72 dpi;
- PNG (ideal) or JPEG format.

Should you wish to embed a custom logo, contact [Resolver Support](#).

Markdown Formatting Overview

Markdown formatting is used to apply simple styling to text. Administrators can apply Markdown to the following items:

- [Fields](#) (Long Name);
- [Standard configurable forms](#) (Free Form Text);
- [Reports](#) (Free Form Text);
- [Email Templates](#) ;
- [Activities](#) (Description); and
- [Views](#) (Description)

See the [Popular Markdown Styles](#) section for more information on applying these styles.

Popular Markdown Styles

STYLE	DESCRIPTION	NOTES	EXAMPLE
#	Creates an H1 header style.	Must include a space between the hashtag and text (e.g. # Example). To terminate the header formatting, insert a new line in the text by pressing Enter on your keyboard.	Example
##	Creates an H2 header style.	Must include a space between the hashtags and text (e.g. ## Example). To terminate the header formatting, insert a new line in the text by pressing Enter on your keyboard.	Example
###	Creates an H3 header style.	Must include a space between the hashtags and text (e.g. ### Example). To terminate the header formatting, insert a new line in the text by pressing Enter on your keyboard.	Example
####	Creates an H4 header style.	Must include a space between the hashtags and text (e.g. #### Example). To terminate the header formatting, insert a new line in the text by pressing Enter on your keyboard.	Example
* *	Italicizes the text.	There can be no spaces between the asterisks and text (e.g. *Example*).	<i>Example</i>
** **	Bolds the text.	There can be no spaces between the asterisks and text (e.g. **Example**).	Example
~~ ~~	Strikes through the text.	There can be no spaces between the tildes and text (e.g. ~~Example~~).	Example

STYLE	DESCRIPTION	NOTES There can be no spaces between the dash and the list items	EXAMPLE
- - -	Creates an unordered list.	(e.g: -Example 1 -Example 2 -Example 3). You may continue the unordered list past three items, if needed.	• Example 1 • Example 2 • Example 3
1. 2. 3.	Creates an ordered list.	Spaces between the numbers and text are permitted (e.g: 1. Example 1 2. Example 2 3. Example 3). You may continue the ordered list past three items, if needed.	1. Example 2. Example 3. Example
[Text](http://www.url.com)	Creates an inline link with text.	The "http://" or https:// prefix must be included (e.g. [Example Text]http://www.example.com)).	Example Text
[Text](http://www.url.com "alt text")	Creates an inline link with text and alt text.	The "http://" or https:// prefix must be included (e.g. [Example Text] (http://www.example.com "Example Alt Text"))).	Example Text
![alt text] (http://www.imageurl.com)	Inserts an inline image with alt text.	Alt text and the "http://" or "https://" prefix must be included (e.g. ![Resolver Logo](http://www.resolver.com/logo.png)). The image will appear in its original size.	

Printing Overview

You can print a form or report directly from your browser by pressing Ctrl + P (Windows) or Cmd + P (Mac).

To include additional graphics, such as the color of a unique ID or current workflow state, follow the instructions below:

For Chrome:

1. Click Ctrl + P (Windows) or Cmd + P (Mac) to open Chrome's printer settings.
2. Click **More Settings**.
3. Select the **Background graphics** checkbox.

For Internet Explorer/Edge:

1. If you're using Edge, click the  icon in the top-right corner of the browser, then click **Open with Internet Explorer**.
2. From Internet Explorer, click Ctrl + P (Windows) or Cmd + P (Mac) to open the printer settings.
3. Click the  icon.
4. Hover your cursor over **Print**, then click **Page Setup**.
5. Select the **Print Background Colors and Images** checkbox.
6. Click **OK**.

See the [Print from Chrome](#) article from the Google Support Site or the [Print webpages using Internet Explorer](#) article on the Microsoft Support site for more information.



If you're printing a table with multiple pages, each page of the report will need to be printed individually.



If a form or report is not printing in color, check your printer's settings.

Glossary of Terms

<i>TERM</i>	<i>DEFINITION</i>
Action	Actions are saved to activities and appear to users as a button that, when clicked, will display a selected form so users enter and save data in an object.
Action (Transition)	Actions on a transition allow administrators to add an automated process to an object as it moves through its workflow states. The Messaging action on a transition sends an email to users within a selected role once an object has transitioned, while the Role Management action automatically adds the user transitioning the object within a specific role to the object so that they may access it.
Activity	Saved to an application, activities determine the data an end user will create, edit, and view through any actions or roles saved to that activity.
All Access	A user account settings, All Access grants users access to all object types and their objects within the organization. This means a user with these settings enabled will be able to view all objects and their data without an administrator adding the user to a role, adding one or more object types to the role, then configuring the workflow permissions.
Anchor	The object type selected to create a report. Anchors are then used to create data definitions, which allow you to select which relationships and references the report data will be drawn from.
Anonymous Login	A tool that uses a single user account to generate a link to grant multiple users limited access to CORE. Users with the link don't need to provide login credentials, but may only view the form/activity selected in the settings.
Application	A composite of all the key elements within CORE (object types, object type groups, fields, forms, roles, etc.) that directs the flow of data to end users. Applications hold activities where users complete tasks (actions) and view information (views).
Assessment	Allows users to collect, review, and assess data by evaluating business activity (e.g. audit, investigation, control assessment, etc.) continuously or from a particular point in time, from different dimensions. Assessments have functionality similar to object types and can have components, workflows, objects, and can be added to applications, reports, and object type groups, etc.
Bar and Column Charts	A type of report that can be shown as bars or columns and displays data from numeric fields, select lists, formulas, relationships, and workflow states.

TERM Component	DEFINITION
	A field, relationship, reference, formula, or role that can be saved to an object type that can then be added to a configurable form.
Condition	A set of requirements that must be met before an object is moved to a state and an action is performed. Conditions are created on triggers in an object type's workflow.
Configurable Forms	A feature that allows you to create custom forms for users to complete as they work through actions and views within an activity. You can create headers, include instructions, add relationships, references, formulas, and roles (components), as well as add fields that can be marked as required or read-only. You can select specific configurable forms to display depending on the current state of the object.
Creation state	An auto-created state on every workflow that cannot be deleted, but its name, description, color, triggers, and transitions can be edited. An object cannot be saved until it has successfully transitioned from the Creation state to another state in the workflow.
Data Definition	Used to select which relationships and references a report or assessment will draw its data from. The relationships and references you can choose from depend on the report's anchor or assessment's focus object type.
Data Import	A feature that allows you to create new objects and enter relationship data in bulk by entering data on a spreadsheet, then uploading that spreadsheet into CORE. Data Import does not create new object types or relationships, but it can update existing objects' data.
Data Path	Part of a data definition in a report or assessment, the data path displays all the relationships and references saved to the selected anchor or focus object type, so you choose which object types data is drawn from.
Default form	An auto-created form that displays all the components added to an object type (except roles). Default forms cannot be edited, but you can control the components a user sees through configurable forms.
Default state	An auto-created state on every workflow that can be edited or deleted as needed, however, if this state is deleted, you must ensure the Creation state which is also auto-created, has another state to transition to as failure to do so will prevent an object from being saved.
Dimension	The category of data that appears on an assessment. Dimensions can be custom (similar to a select list) or based upon any relationships or references saved to the focus object type.

End users <i>TERM</i>	The non-administrative users who work with CORE and its applications after the applications have been created and configured. <i>DEFINITION</i>
Explicit permissions	Permissions on a role that grants users access to specific objects based on the object types added to the role. Before a user can see any objects, the role must be added as a component on the object type and configurable form, then the user must be selected in the role field that appears on the form. Users with explicit permissions may also be granted inferred permissions so they can view objects related through relationships or references. You may also need to configure inferred permissions for roles with explicit permissions enabled.
Field	A component added to an object type and configurable form where a user can input data. Fields can include plain text, numeric, date and time formats, as well as select lists (dropdown menus), and attachments.
Formula	A component that compiles data from numeric and variable values to generate conclusions, such as Incident Severity, Estimated Damage, or Likelihood the Incident Will Recur by displaying data on objects as a number, label (e.g. Low, Medium, High), or both a number and labels, all with optional colors. Variable data is created from numeric data from fields added directly to an object type or from fields on an object type added through a relationship or reference.
Focus	The object type selected to create an assessment. Focus object types are then used to create data definitions, which allow you to select which relationships and references the assessment data will be drawn from.
Global permissions	Permissions on a role that grants users access to all the records (objects) for the object type(s) added to that role. Users with global permissions do not need to be added to an object to view it nor do they need to be granted inferred permissions, but what they can do with the objects (create, read, edit, etc.) is determined by their role's workflow permissions for each state.
Inferred permissions	Additional permissions on a role that allows administrators to select which additional objects, connected through relationships or references, a user has access to without directly granting permission through the role field on a form. This ensures users within a particular role with explicit permissions are indirectly given the appropriate access to the information they need when interacting with related objects.
Instance	An object that contains the same data as an existing object referenced on an assessment. Instances are saved to the assessment and contain the same data as the original object, but are assigned unique IDs that are .1 number higher than the original. Any additional instances on the same objects are assigned IDs that continue incrementally (e.g. .2, .3, .4, etc.). You can also identify instances in a view because they display the dimensions from the assessment below their names.

TERM	DEFINITION
Heat Map	A report type that uses colors and X and Y axes to show where object data falls on a scale. Heat maps are most commonly used when analyzing an organization's risks, the likelihood the risks will occur, and the impact on the organization should they occur.
Monogram	One to three letters, with or without a color, that represent and help you quickly identify object types throughout the system.
Object	A record saved to an object type (the record category). For example, Incident is the object type, while Accident, which outlines the details of an on-site incident, is the object.
Object type	The category of the data collected (e.g. Incident, Employee Record, Witnesses, Vehicles, etc.). Once a record is saved to an object type, it becomes an object. Object types can be configured to control who can access them, what fields are visible and completed on forms, and the process through which the data is collected.
Object type group	One or more object types assembled into a group for the purposes of creating a relationship. When creating a relationship, you must select an object type group, which determines which object types the data is drawn from when completing the relationship field or table on a form.
Org Manager	A feature through which you can duplicate the configurations and user accounts (but not the data) of an existing organization into a new organization. This is done by exporting the configurations from the existing organization into a JSON file, then uploading the file to a blank organization through Org Manager.
Pie chart	A type of report. Pie charts can be shown as a full pie chart or half-pie chart and display data from numeric fields, select lists, formulas, relationships, and workflow states.
References	A component that indicates that multiple objects are connected through a relationship. For example, if you created a relationship called "Incident Report Writer" on the Incident object type using a group with the Employee Record object type saved to it, you can add a reference to an Employee Record configurable form to show any incidents an employee may have created. References are automatically created with relationships.
Relationships	A component that connects two or more object types together when object types are added to an object type group and that group is selected when creating a relationship. For example, to track which employees are creating Incident objects, you would add the Employee Record object type to a group called "Employees,"

TERM	DEFINITION
	then create a relationship on Incident using the Employees group, naming the relationship "Incident Report Writer." Users creating new Incident objects will now be able to select or create an Employee object in the "Incident Report Writer" field to indicate who created the report.
Reports	Displays data from a selected anchor (object type) in pie charts and tables. You can also add free form text to reports.
Roles	A feature that controls the data a user can create, edit, delete, view, or manage on object types. When users are added to a role, they're bound by the permissions configured on the role, which include global, explicit, or inferred permissions.
States	The various stages of the data collection process (e.g. Create, Triage, Review, Investigate, Close) that are saved to a workflow. You can create multiple states, but you must have at least two states on an object type to successfully save new objects.
Table	A type of report that displays data in columns based on your selection in the report settings. Users can click on any of the data in the report to display a form selected by administrator. Table data can be exported to a Word or Excel file from a view.
Transition	A workflow element that defines the state an object will move to once a trigger has been clicked on a form. For example, if a user clicks the Create trigger, the transition saved to that triggers determines that the object will move to the Triage state. You can also add actions to transitions that can send emails to users within selected roles or automatically add the currently logged in user within a selected role to object so that they may access it once it has transitioned.
Trigger	The event in a workflow that prompts an action and the movement of an object from one state to another. Triggers are either timed to automatically prompt an action each night or appear as clickable buttons on a form that, once clicked, moves the object to another state and performs an action based on the transition saved to the trigger. For example, clicking Create on a new Incident will move the object from the Creation state to Triage. The state an object moves to is determined by the transition saved to the trigger.
User Groups	A collection of CORE users saved to a group (e.g. Employees or Managers) for the purposes of quickly adding those users to roles.
Value	Data entered or selected in a field. For example, Name is the field, but the data entered in that field, John Doe, is the value.
View	Displays reports and/or list of objects a user can review or edit as needed. You can specify which objects, reports, or forms are displayed based on the object type

and workflow state. Views are saved to activities.	
TERM	DEFINITION
Workflow	Settings that allow administrators to control the flow of data as well as define what data is displayed, where it's displayed, and to whom it's displayed through applications, activities, search results, reports, and assignments. Workflows are comprised of states, triggers, transitions, conditions, and actions. Each object type must have a workflow.

Technical Support

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General Inquiries

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Website: <http://www.resolver.com>

Email Templates Orientation Video

The video below will provide a quick introduction to the **Email Templates** settings. For more detailed information, see the following articles:

- [Email Templates Overview](#)
- [Create a New Custom Email Template](#)
- [Edit or Delete a Custom Email Template](#)
- [Edit the Default \(Standard or Assigned\) Templates](#)

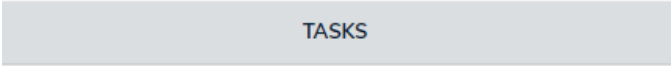
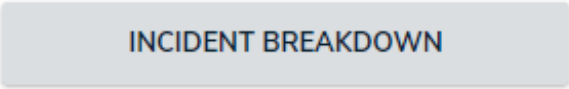
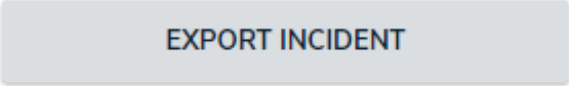
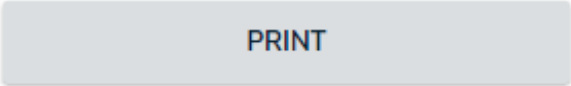
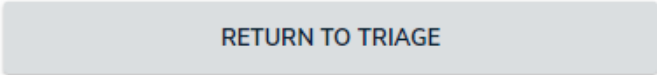
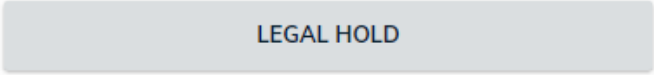
Your browser does not support HTML5 video.

Version 2.4 Feature Overview Video

This video covers some of the new features available in the 2.4 release. For a full list of features and bug fixes, check out the [Version 2.4 Release Notes](#).

Incident Review Buttons DELETE?

The following buttons are available on the **Incident Review** form. These buttons may or may not be available, depending on your role permissions. Your organization may have chosen to change the names of these buttons.

Button	Function
	View tasks associated with this incident.
	View related incidents.
	Export incident details into Excel format for use with third-party analytics tools.
	View a printable incident form.
	Move the incident workflow stage to Under Investigation.
	Send the incident back to triage.
	Move the incident workflow stage to Closed.
	Move the incident workflow stage to Legal Hold.



General Users Guide to the WAVR-21 V3 and the WAVR-21 Threat Assessment App

Stephen G. White, Ph.D., & J. Reid Meloy, Ph.D.

Welcome to the WAVR-21 Threat Assessment App ("WAVR-21 App") – the digital version of the WAVR-21 V3, a structured professional judgment guide for the assessment of workplace and campus violence risk – and a component of Resolver's enterprise software application.

Workplace violence, including campus violence, remains a recurrent issue for employers, administrators, their managers, and the specialists charged with keeping the members of their work communities safe. As an evidence-based structured professional judgment guide, or "SPJ", the WAVR-21's acceptance and use continues to grow.

With Resolver's electronic version, users have the WAVR-21 tools in more accessible, dynamic formats, and the advantage of record-keeping and enhanced communication that digital programs provide. The WAVR-21 App offers many features. Various "help" guides within the app assist users with coding, investigative and procedural steps, and to readily find risk-related topics in the manual.

The WAVR-21 App includes the following content in the WAVR-21 V3:

. Third Edition Manual

Published in 2016, the V3 manual has been extensively revised and updated from the V2 edition. The [Table of Contents](#) provides an overview. Most significantly, the WAVR has been expanded to encompass the risk assessment issues at institutions of higher learning. As an educational resource the manual is highly valuable to users at all levels of competence.

. Intake and Documentation Questionnaire

This new, comprehensive form has been extensively revised and expanded beyond the V2 Intake Form which it replaces. The queries on the form address all the factors on the revised V3 Worksheet. The form documents risk-relevant investigative information but without coding the data. The advantage is that users who are not designated threat assessors or coders can still have a tool for collecting pertinent information.

. Worksheet

The V3 Worksheet and its item coding scheme have been updated to reflect more recent research, the continuing case experience of the authors and other professionals, and the inclusion of more specific campus-related criteria. It is intended for use by all professionals in threat assessment roles, regardless of discipline, with the caveat that users remain within the boundaries of their experience and training, and have available to them sufficient consulting relationships with threat assessment experts. The item coding categories are *absent*, *present*, and *prominent*. A factor or item can also be coded for *recent change*. If there are not enough data at a given point in time to code an item, then it is marked as *insufficient information*. It is important to keep in mind that insufficient information is not the same as having investigated a factor adequately enough so that an assessor can reliably state that a risk factor is "absent" in a given case.

. Grid

The V3 Grid is a one-page summary of the Worksheet, consisting of the titles of the 21 WAVR factors and item coding columns.

Some Precautions

- Employers and administrators should remain keenly aware of whom in their organization is authorized to use and have access to these materials, and the sensitive case information they generate.
- Training in using the WAVR-21 to *assess and manage* violence risk is highly recommended; in fact it is essential for most users. Such complementary training to using the eWAVR app is not provided through Resolver, but may be obtained in various ways. We, the author-developers of the WAVR-21, offer a two-day intensive training available to individual organizations, and periodically in public formats that individual users may attend. We are also producing an online training that will soon be available. Please go to wtsglobal.com or wavr21.com [[links](#)] for more information on these options. We each integrate WAVR-21 training into the threat assessment services we provide for individual client organizations. Additionally, several individuals within our professional group are designated to conduct WAVR-21 training for organizations.
- All threat assessment teams functioning in organizational contexts should establish relationships with an assessment expert (or experts) with whom the team may consult at any time, but especially for more complex or apparently serious risk scenarios.
- Users should always be mindful that their level of experience and training is sufficient for the threat management duties they undertake. Peer support within an organization's team benefits those with less experience. As threat assessment teams are by design multi-disciplinary, its members need a common, readily understandable behavioral knowledge base for carrying out their critical duties. In line with this operational principle, our intention with the WAVR-21 is to present and explain violence risk and threat assessment criteria in a style as free as possible from unnecessary jargon. Any clinical or diagnostic terms are explained and examples offered. Although many "incidents of concern" can be fairly readily identified as not presenting a potentially serious risk of harm, there is no avoiding the realization that gaining sufficient competence in conducting threat assessments takes time and requires practice. A universal practice standard for mental health and other professionals is to seek consultation when one is faced with behavioral, or for that matter any risk of harm issues, that are beyond their level of experience and training.

Using the WAVR-21 App

Ideally the WAVR-21 App is used from the beginning and throughout a workplace or campus threat management case. Case data, assessment opinions and actions taken can all be documented – including *changes over time* in apparent levels of risk or concern – consistent with the dynamic flow of threat management in organizational settings. Individual users can identify themselves and the dates and sources of their entries, and navigate easily among the forms and case files.

.Helpful information on using the forms, pertinent data sources, investigation and interview strategies, and documentation considerations is also available in the [Basic Procedures](#) section at the beginning of chapter 4 in the manual.

The following describes the general steps in case management using the WAVR-21 App, and recommended guidelines for proceeding:

Home Page

Users will see the following categories on the left column of the home page:

- **Home:** This shows the user's tasks, work flow status and other "dashboard" information.
- **Report Incident:** This provides users with the "Report a Concern" entries that come into the app through the portal available to the members of the organization's members.
- **Case Files:** This includes the "New Case Queue" and "Active Cases" files for the individual user.
- **Assessment Worksheets:** This includes the case worksheets that are "In Progress," "Under Review," and "Completed" in the individual user's files. The user may also access these forms from his or her case files.
- **Reference Information:** This section provides reference material and standard reports. Included here is the WAVR-21 V3

manual in its entirety for quick reference. In addition, access to the entire database of “Persons,” “Employees,” or “Students”, who may or may not be involved in cases, not just solely “individuals of concern.” This can be used to load and check employee and student records that could be used to link to cases. Finally, as standard reports are released, they can be executed from this area. Entire case files or person-centric timelines are located here.

Report Incident

A case typically begins when a member of the organization uses the “Report a Concern” about violence on the app’s portal. Concerns may also come to team representatives, of course, by other avenues or outside sources.

Notification

An email notification is sent to the team’s or organization’s designated screener or screeners of all reported concerns from the portal.

Screening

Designated screeners review the incident report or concern and should enter an Incident Report Summary in Section A of the Intake and Documentation Form. Any of the five key indicators of risk that are deemed present are checked, and a priority level for response is selected by the screener(s). Screeners *may* have discretion to dismiss or redirect reports by certain criteria established by the team, keeping in mind the basic principle of, “When in doubt, confer.” (See FAQ #1 below for further explanation)

Case Intake and Documentation

When deemed appropriate or if the screener has any doubt, the case is “forwarded” to the team or team members in the role of case assessors and managers. Additional, continuing data are gathered and entered into the Intake and Documentation Questionnaire commensurate with the apparent level of concern about risk of harm. Interventions and responses undertaken are also recorded. Theoretically, data are never “complete,” but as more information is developed throughout the course of the case it should be entered into this form, and/or into the Worksheet.

Worksheet Data Entry and Coding

The team, or its members designated to do so, begin to fill in the “Notes” sections of the Worksheet and the coding of the 21 factors. Date stamps allow for documenting how coding may change over time and circumstances. The app readily accesses coding criteria for each item.

Continuing case assessment and management actions

Record ongoing entries for assessment and case management actions and related events using the WAVR-21 App forms.

FAQs

What is the distinction between screening for risk and conducting a violence risk assessment?

Screening is the gross or general determination, based on a review of initially presented or available information, of whether or not a particular individual or scenario should be viewed as generating a *concern* for violence, and therefore should be treated under an organization's threat management protocol. The presence or not of key indicators associated with risk will serve as guides for those conducting screening. In Section A ("Incident Report Summary") of the WAVR-21 V3's Intake and Documentation Questionnaire, five such indicators are listed:

- Threats or expressed ideas to harm self or others
- Behaviors that cause concern for violence to self or others
- Subject has access to weapons or is attempting to gain access
- Bizarre thinking, irrational suspiciousness unsupported by facts
- Circumstances/anticipated events that might affect likelihood of violence

Screeners using the form then assign a priority level to the scenario:

Priority Level: ___Low ___ Moderate ___High ___Urgent

Violence risk assessment is formally defined as the investigative and analytical process followed by threat assessment professionals—qualified by education, training, or experience—to determine the nature and level of violence risk presented by an individual or a scenario, and viable actions that could be taken to respond to and mitigate any possible risk of harm. A key point then is what qualifies an individual to conduct assessments; and further, what standard or criteria will an organization and its threat assessment team establish for conducting its own internal "assessments," versus engaging recognized external assessment experts. This is an important decision for organizations to recognize and to make. New and inexperienced teams will or should turn to experts regularly. Learning from their enlisted consultants will gradually increase a team's collective competence. Teams with increasing experience may assess and manage scenarios more frequently without expert help. Still, even experienced teams may engage their designated experts for a "second opinion" to check their own work, or to include, when appropriate, a formal direct assessment in their due diligence. In general, it is advisable for teams to turn to mental health threat assessment experts when certain risk factors are apparent. These include serious [mood disorders](#) , [psychosis](#) , [severe narcissism](#) , and [psychopathy](#) .

Who and how many team members should do the documenting of case data?

This is a matter to be decided by individual teams. *At least one member* should be responsible for collating and documenting the team's (and organization's) assessments and actions, and the accompanying rationale for how it responded to and managed any case. This is a principle of due diligence practice, which the WAVR-21 App facilitates more easily and comprehensibly than just the usual communications found in emails and other reports and case documents (Note that case-related documents can be attached to the WAVR-21 App case files). It is advantageous for the team members from different disciplines to enter information, especially actions, related to their specialty. For example, a security manager may enter the specifics of a protection plan enacted for a certain case or his or her communications with law enforcement. An attorney may enter the legal issues that were identified and addressed, or legal actions taken. A licensed mental health professional may document specific symptoms or previous diagnoses. A risk assessment expert may document his or her opinion of the implications of a subject's delusions.

To what degree should investigators pursue information, and how much should they document?

This is not actually a question about how to use the app, but about case management judgment. The answer to this common and important question is the often used, "It depends." Sufficiently broad sources of collateral information, where possible and appropriate, are essential to conducting reliable violence risk assessments. Corroboration of observations strengthens hypotheses about the level of concern a case poses, and further informs intervention decisions. An issue is how readily and reasonably available risk-relevant information is. If a coworker reports that another employee uttered a threat, the informant is presumably easily available to be interviewed in most circumstances. If a former student is sending voluminous psychotic emails to members of a campus, and he is only known to "live in some foreign country," remedies and resources will be limited to locate him and thus gather further information. If someone is actively stalking a target, it is prudent to conduct a thorough background check for any criminal and civil records. A team must be prepared to defend its decision making and actions, which are validated by the thoroughness and quality of its data base and the members' professional judgments. These issues are discussed more thoroughly

in the WAVR manual. Finally, new team members or participants will greatly benefit from clearly delineated records maintained in the WAVR-21 App case files.

Guidelines for Professional Risk Assessors

Although threat assessment teams in corporate and campus settings are typically composed of professionals from a variety of disciplines, professionals who conduct threat assessments on a fulltime basis will also find the WAVR-21 V3 and its accompanying WAVR-21 App to be indispensable. The WAVR-21 joins a long line of structured professional judgment instruments, yet is specific to the context of work and university settings. Clinical or forensic experts in violence risk assessment, often licensed psychologists, psychiatrists, or social workers, can assist organizations as consultants by conducting either indirect or direct (face-to-face) evaluations of individuals of concern. Clinicians may also function as expert witnesses where the assessment of violence risk is pertinent to civil or criminal proceedings. These professionals are held to a high standard of practice by the court—usually determined by their education, training, and experience—and will readily recognize and benefit from the rationale and evidence-based structure of the WAVR-21. As the research base for the WAVR-21 grows, the instrument will also gain acceptance in both civil and judicial settings as an important organizing tool for professional threat assessors.

Professional threat assessment experts will be at their best if they: [new paragraph]

- recognize that some cases will demand a need for a comprehensive clinical and forensic evaluation which cannot be handled by the internal threat assessment team.
- recognize that most cases will not need such an evaluation, and can be efficiently and effectively handled by the internal threat assessment team.
- conceptualize their role as both assessors and educators, functioning as ad hoc team members, and not as indispensable experts who presume to take over the case and impart their wisdom to less experienced professionals.
- recognize the role of organizational culture and contexts, and the importance of collateral information in conducting violence risk assessments.
- recognize that threat assessment and threat management are dynamically related, and do not occur in sequence: each threat assessment affects threat management, and each attempt to manage can affect the ongoing threat assessment.
- know that their major focus is to not predict the future, but to help the teams manage behaviors of concern in the present.
- know that prevention does not require individual prediction.
- recognize the value of meeting personally with and getting to know the organizational team members with whom they regularly work and consult.

