

Creating a New Assessment Type

Last Modified on 09/17/2025 9:38 am EDT

Overview

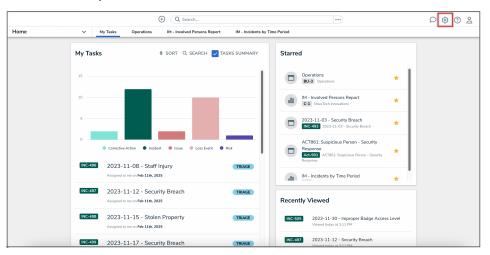
Once an assessment type has been created, you can add it to data visualizations, object type groups, relationships, roles, configurable forms, actions, and views.

Related Information/Setup

Please refer to the Assessments Overview article for further information on using assessments in Resolver.

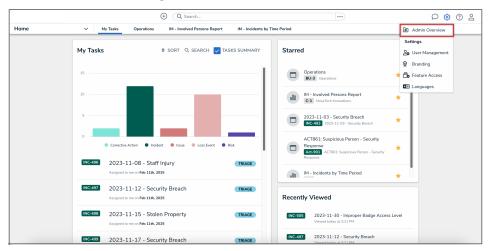
Navigation

1. From the *Home* screen, click the **Administration** icon.



Administration Icon

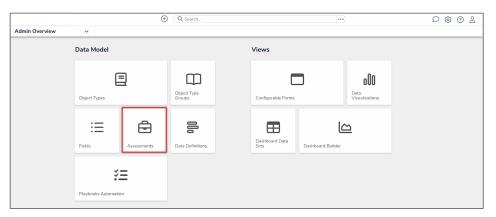
2. From the **Administrator settings** menu, click the **Admin Overview** link.





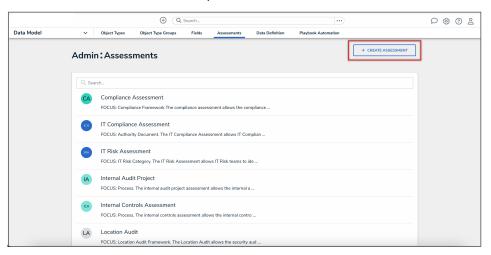
Admin Overview Link

3. From the *Admin Overview* screen, click the **Assessments** tile under the **Data Model** section.



Assessments Tile

4. From the *Admin: Assessments* screen, click the **Create Assessment** button.

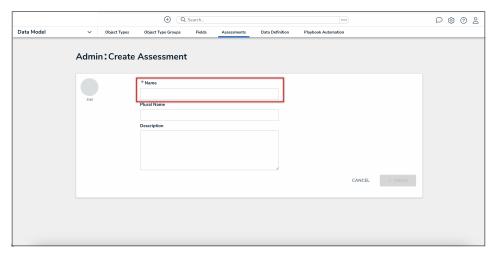


Create Assessment Button

Create a New Assessment Type

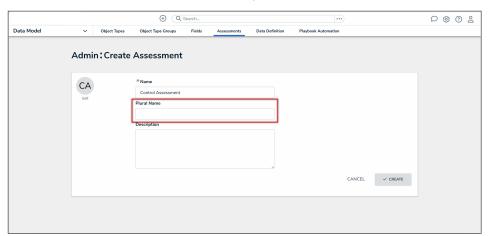
1. In the **Name** field, enter a name for the assessment.





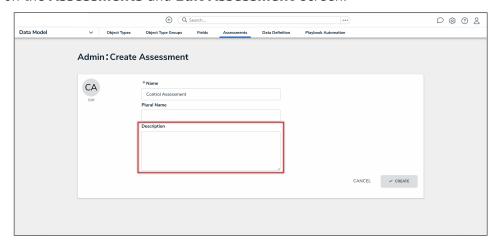
Name Field

 (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., "Control Assessments" instead of "Control Assessment").



Plural Name Field

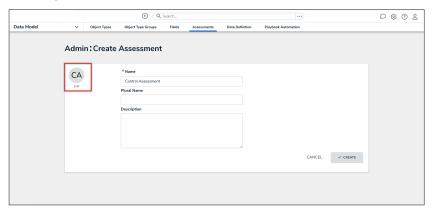
3. **(Optional):** Enter a description of the assessment type in the **Description** field, which will appear on the **Assessments** and *Edit Assessment* screen.



Description Field

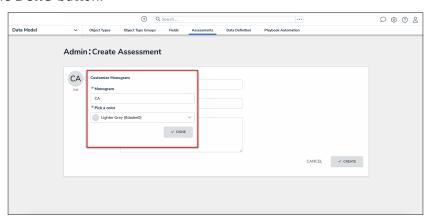


- 4. **(Optional):** To edit the assessment monogram:
 - a. Click the monogram icon to the left of the **Name** field.



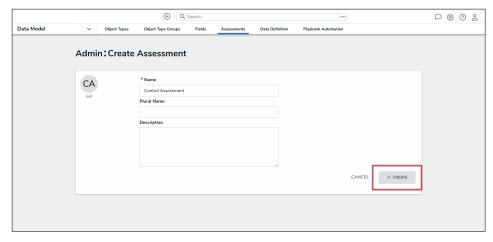
Monogram

- b. In the *Customize Monogram* pop-up, 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.
- d. Click the **Done** button.



Customize Monogram Pop-Up

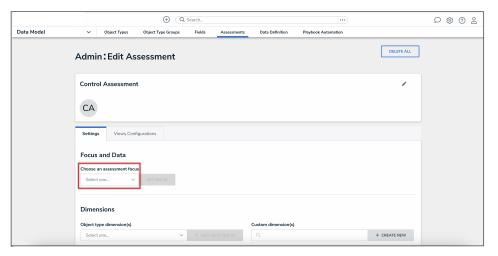
5. Click the **Create** button to display the **Admin: Edit Assessment** screen.





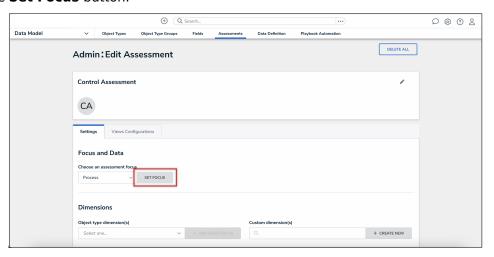
Create Button

6. In the **Settings** tab, from the **Focus and Data** section, 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.



Choose an Assessment Focus Dropdown

7. Click the **Set Focus** button.



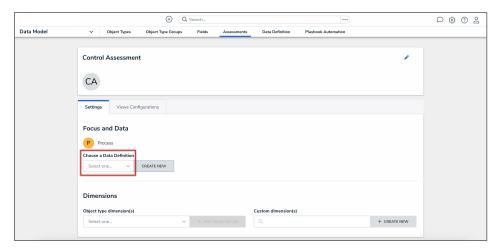
Set Focus Button



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

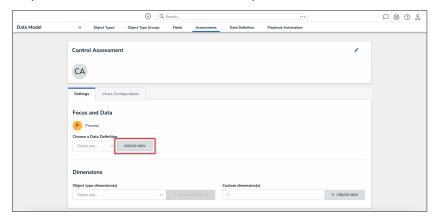
8. To choose an existing data definition, select it from the **Choose a Data Definition** dropdown menu.





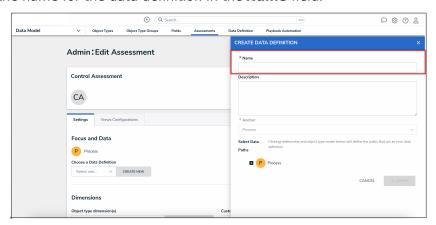
Choose a Data Definition Dropdown

- 9. To create a new data definition:
 - a. From the Choose a Data Definition dropdown, click the Create New button to open the Create Data Definition panel.



Create New Button

b. Enter the name for the data definition in the Name field.

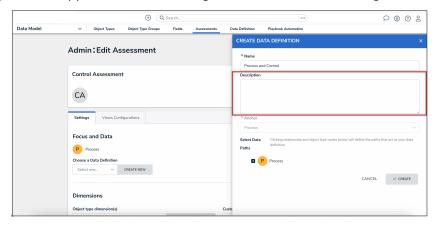


Name Field

c. (Optional): Enter a description for the definition in the Description field. This

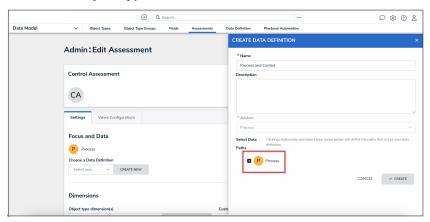


description will appear when reviewing the data definition settings.



Description Field

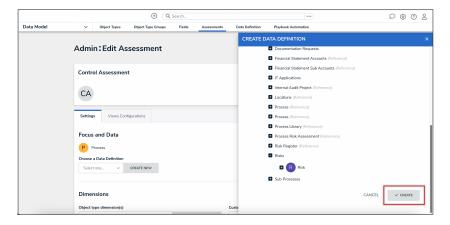
d. Click the monogram, which represents the focus object type you're currently working in, to expand the node and any reveal relationships and references saved to the focus object type.



Monogram

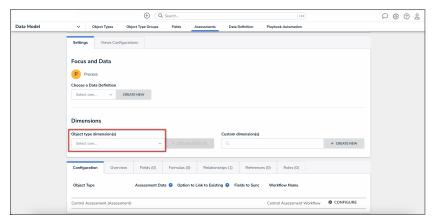
- e. Click a relationship or reference to show the related object types (e.g. clicking the "Controls" relationship will reveal the Control object type).
- f. Click an object type to place a checkmark next to it and add the object type to the data definition. Any object types selected in the data definition 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.
- g. Continue placing checkmarks beside the object types as needed.
- h. Click the **Create** button to close the palette.





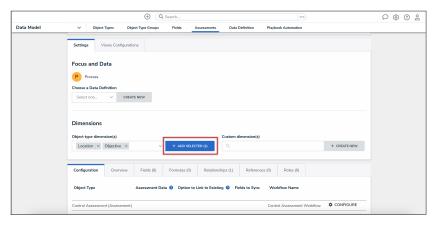
Create Button

- 10. In the **Dimensions** section, 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):
 - a. Click the **Object Type Dimension(s)** dropdown menu and 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).



Object Type Dimension(s) Dropdown

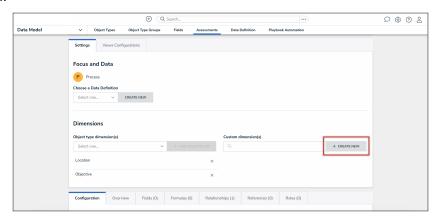
b. Click the Add Selected button.



Add Selected Button

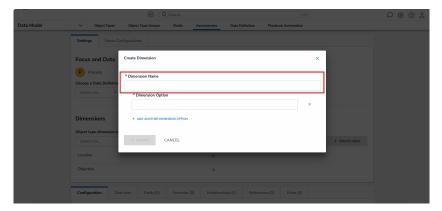


- 11. To create a custom dimension, which will appear on the assessment as a dropdown menu with predefined options (like a select list) and will **not** allow users to select existing objects:
 - a. From the Custom Dimension(s) dropdown menu, click the Create New button.



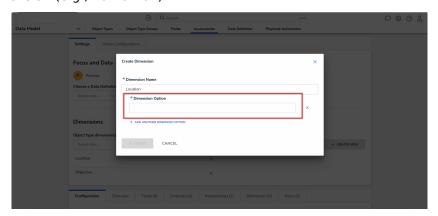
Create New Button

b. From the *Create Dimension* pop-up, enter a name in the **Dimension** Name field (e.g., Location).



Dimension Name Field

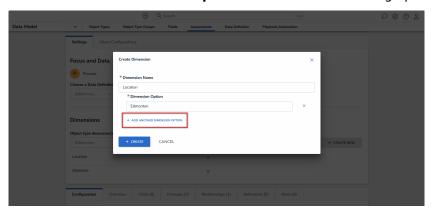
c. In the **Dimension Option** field, enter the name for an option as it will appear in the dimension (e.g., Edmonton).



Dimension Option Field

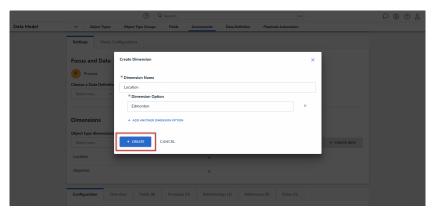


d. Click the **Add Another Dimension Option** link to continue adding options.



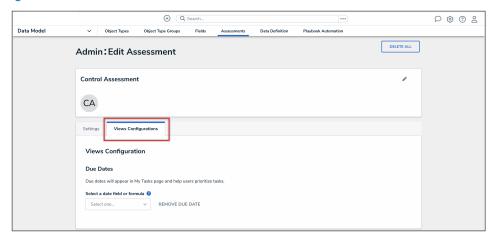
Add Another Dimension Option Link

e. Click the Create button.



Create Button

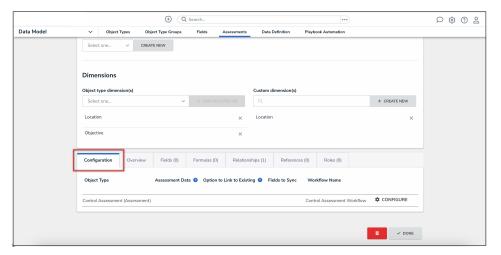
12. From the **Views Configuration** tab, you can add a due date to the assessment so that that users can view and prioritize upcoming and overdue tasks in the **My Tasks** card. See the Adding a Due Date to an Assessment article for further instruction.



Views Configuration Tab

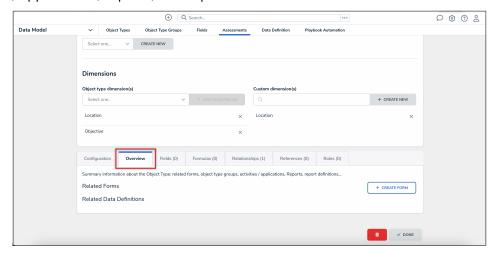
13. From the **Configuration tab**, you can configure the workflows and assessment data. See the Configure an Assessment's Workflows article for further instruction.





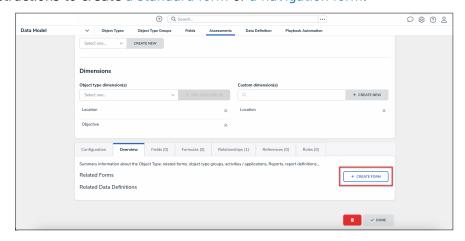
Configuration Tab

14. Click the **Overview** tab to see a summary of the related forms, object type groups, activities, applications, reports, and report definition connected to the assessment.



Overview Tab

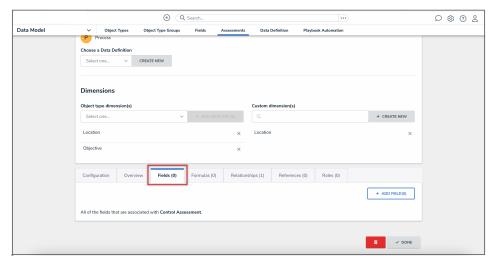
a. To create a form from the **Overview** tab, click the **Create Form** button, and follow the instructions to create a standard form or a navigation form.



Create Form Button

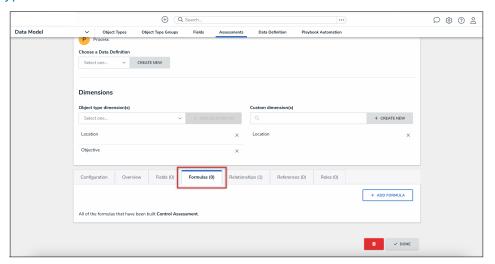


15. Click the **Fields** tab to add fields to the assessment. See the Add Fields to an Object Type article for further instruction.



Fields Tab

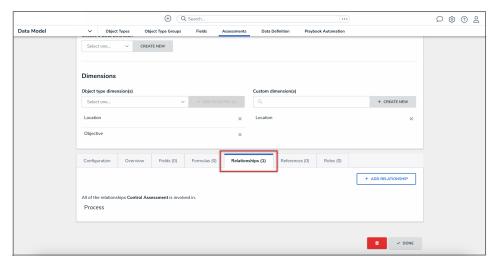
16. Click the **Formulas** tab to add formulas to the assessment. See the Adding Formulas to an Object Type article for further instruction.



Formulas Tab

17. Click the **Relationships** tab to add relationships to the assessment. See the Add Relationships to an Object Type article for further instruction.

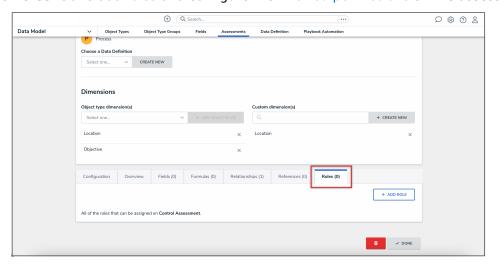




Relationships Tab

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.

18. Click the **Roles** tab to add roles and configure the inferred permissions on the assessment.

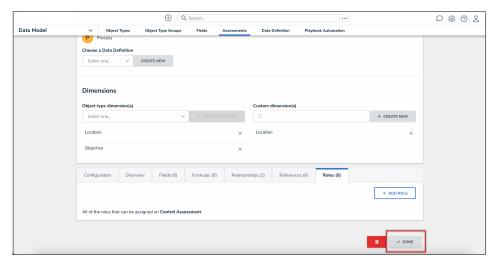


Roles Tab

19. Click the **Done** button.

Note:





Done Button

- 20. Create a navigation form to complete the scope and launch of the assessment.
- 21. 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.
- 22. Add the assessment to an action so assessment objects can be created through an activity.
- 23. **(Optional):** Add the assessment to a view so existing assessment objects can be viewed through an activity.