Create a New Assessment Type

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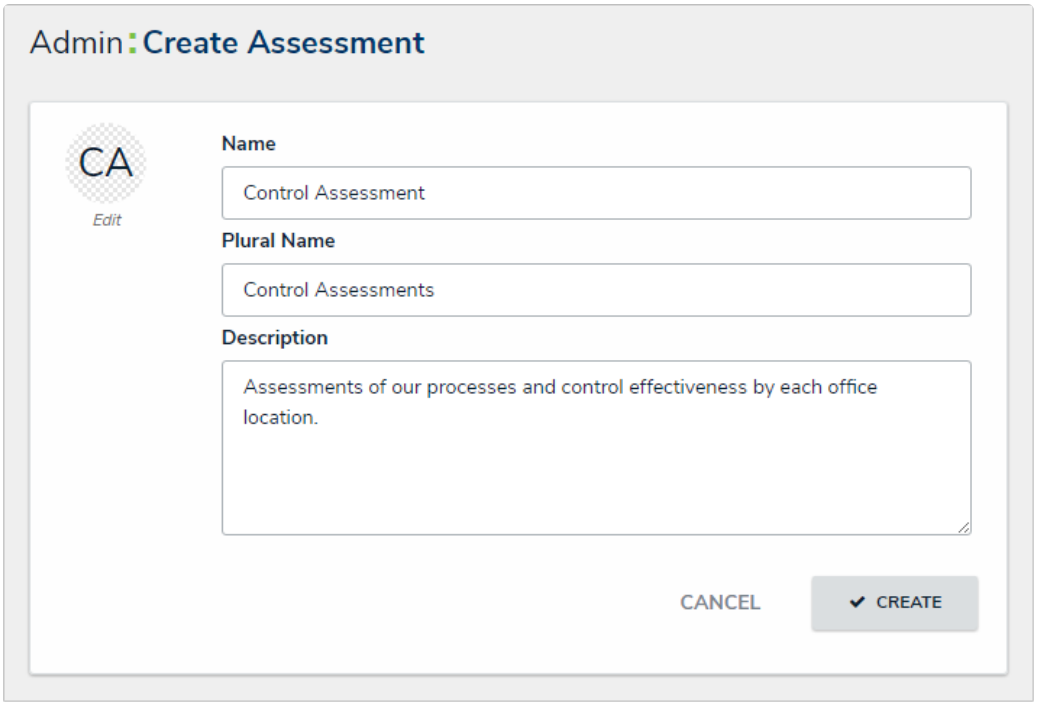
Once an assessment type has been created, you can add it to data visualizations, object type groups, relationships, roles, configurable forms, actions, and views.

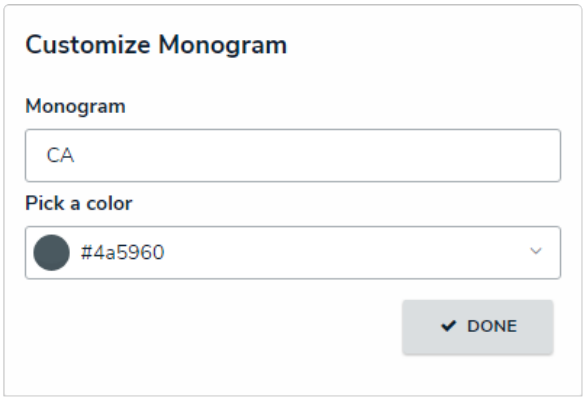
To create a new assessment type:

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 Assessment**s**” 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.

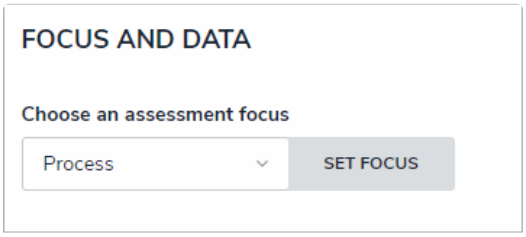
5. **Optional:** To edit the assessment monogram:
    a. Click the monogram icon to the left of the **Name** field.
    b. Enter 1 to 3 characters in the **Monogram** field.
    c. Click the **Pick a color** dropdown menu to reveal the color picker. You can also type a hex color into this field to select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



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**.

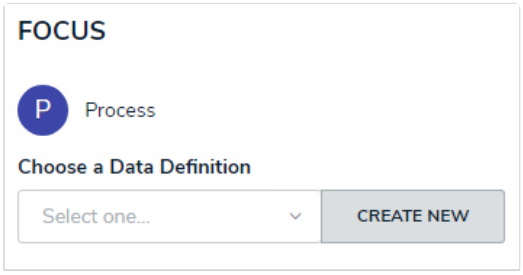


The Focus dropdown menu. The object type selected here will determine which data definition can be selected for the assessment.

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

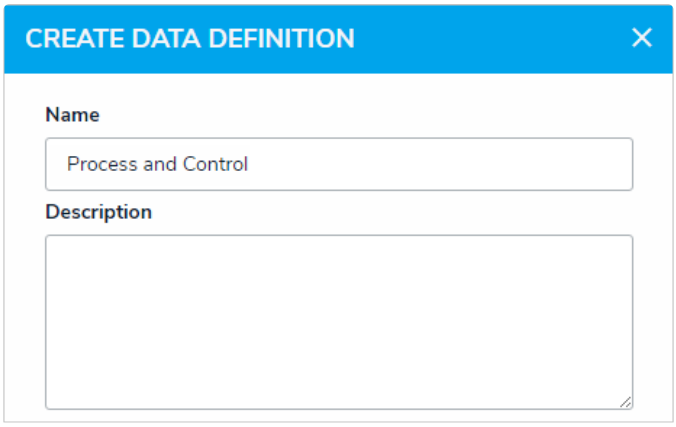
9. To choose an existing data definition, select it from the **Choose a Data Definition** dropdown menu.
10. To create a new data definition:

a. Click **Create New** to open the **Create Data Definition** panel.



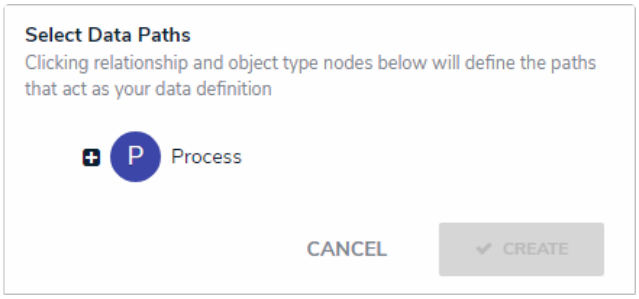
The Data Definition section, which appears after selecting a focus.

b. Enter the name for the definition in the **Name** field.
c. **Optional:** Enter a description for the definition in the **Description** field. This description will appear when reviewing the Data Definition settings.



The Create Data Definition screen.

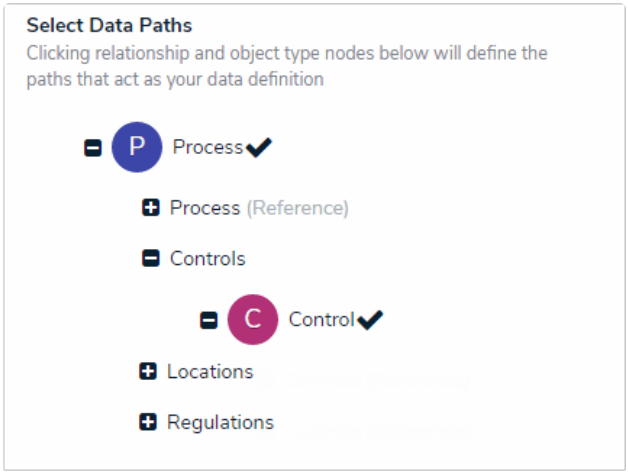
d. Click the monogram, which represents the focus object type you're currently working in, to expand the node and any reveal relationships and references saved to the focus object type.



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.



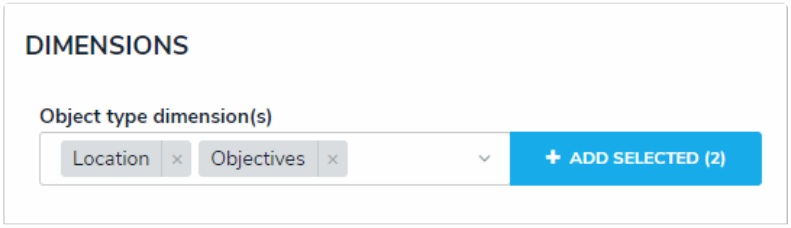
Selecting object types on a new data definition. The object types selected can then be used as dimensions or reference data.

g. Continue placing checkmarks beside the object types as needed.

h. Click **Create** to close the palette.

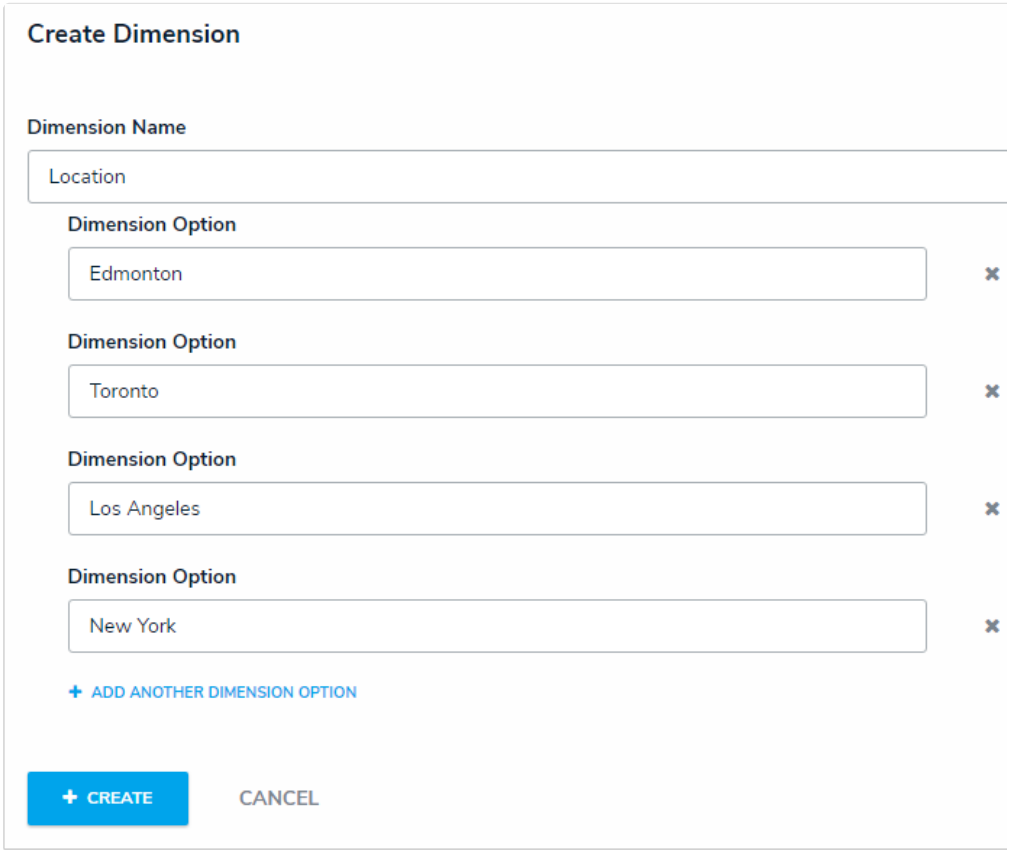
You can review the data path of the definition from the Data Definitions section in **Administration**.

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):
    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 (like 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 **Configuration tab** to configure the workflows and assessment data. See the Configure an Assessment's Workflows for more detailed information.
14. Click the **Fields** tab to add fields to the assessment.
15. Click the **Formulas** tab to add formulas to the assessment.
16. 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.

17. Click the **Roles** tab to add roles and configure the inferred permissions on the assessment.
18. Click **Done**.
19. Create a navigation form to complete the scope and launch of the assessment.
20. 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.
21. Add the assessment to an action so assessment objects can be created through an activity.
22. **Optional:** Add the assessment to a view so existing assessment objects can be viewed through an activity.