

Assessments Overview

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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 using dimensions (e.g., locations, business units, quarters, etc.).

Though there are some additional features and configurations, assessments have a functionality like object types. With assessments you can:

- Configure their [workflows](#)
- Add components
- Create [configurable forms](#) or [data visualizations](#)
- Create an assessment object through an [activity](#) or [Quick Create](#)
- Add them to [object type groups](#), [roles](#), [actions](#), or [views](#)
- [Search](#) for assessment objects
- 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 data visualization), a **data definition** (also similar to [data definitions](#) on a data visualization) 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.

Creating an Assessment Overview

The steps below provide an overview of creating an assessment:

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 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 asse

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 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 [data visualization](#) to analyze its data.