Configure Assessment Workflows

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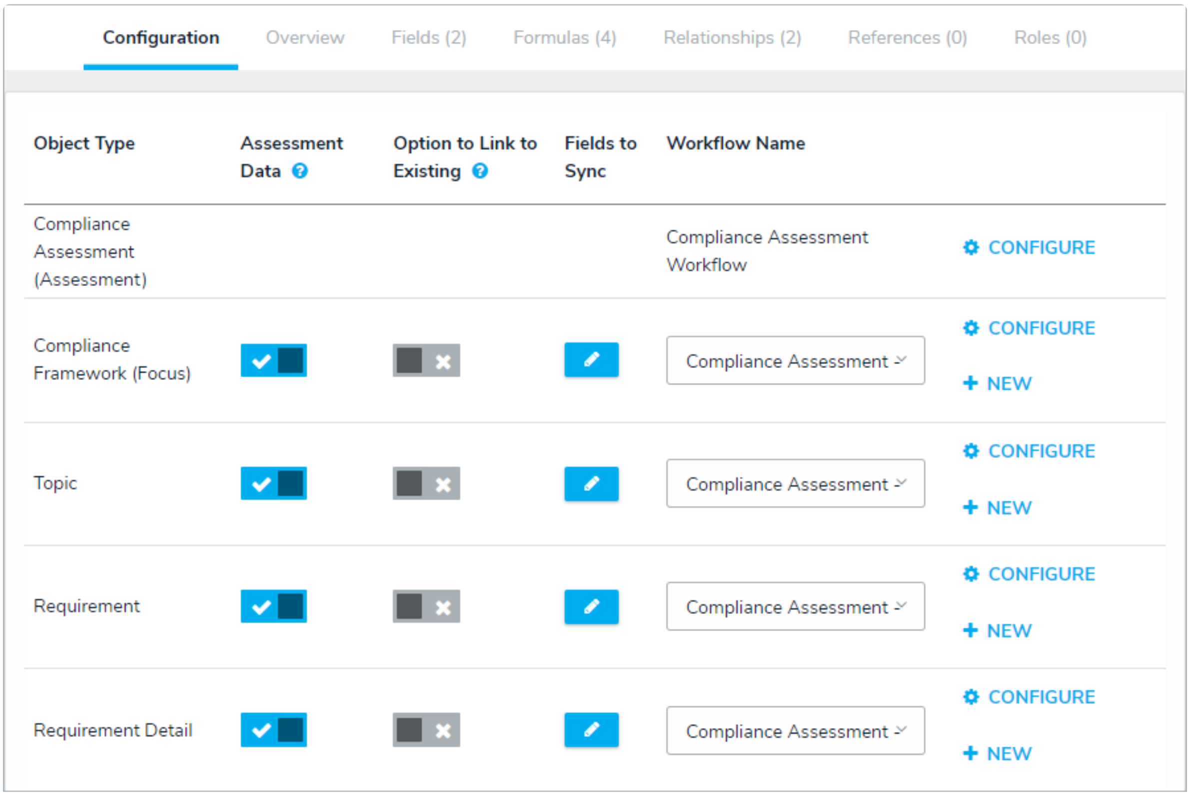
To configure an assessment's workflow(s):

1. Click the icon in the top bar **Data Model > Assessments** section.
2. Click the relevant Assessment Object Type or enter its name in the **Search** field.
3. Click it to display the **Edit Assessment** page. Scroll down to the **Configuration** tab.



The Configuration 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 mark data from an object type as reference data and prevent instances (clones) of its objects from being created during the assessment, click the icon beside an object type to disable the **Assessment Data** option. Read more here: Assessment Reference Data.

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

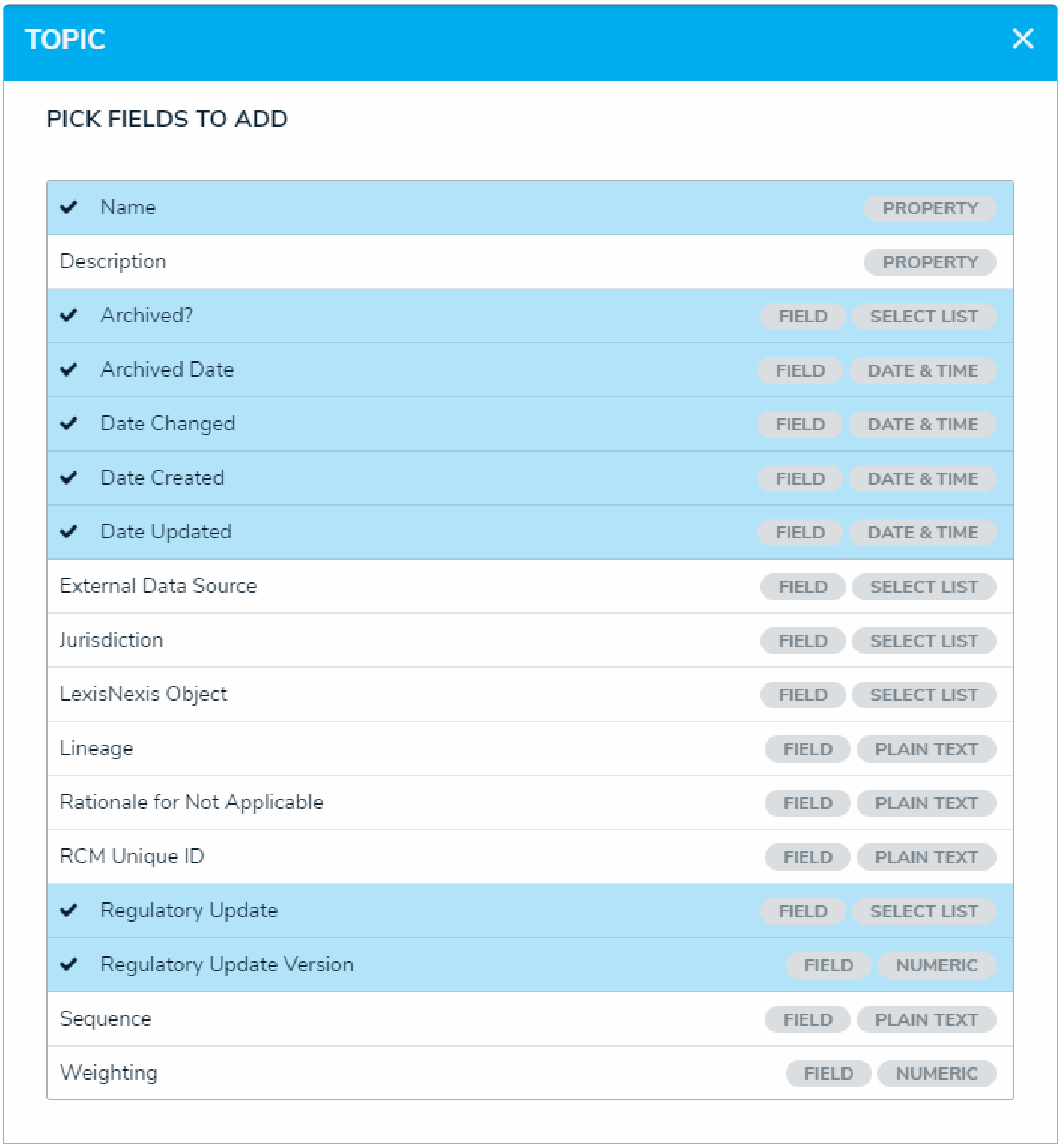
5. To allow other assessments to reuse the instances (clones) from this assessment, click the icon beside an object type to enable the **Option to Link to Existing** toggle. Read more here: Link to Existing (Rely On) Assessment Data.
6. To determine which fields will be updated when the user pushes an update to an assessment from an object's Assessment section:

   a. Click the button in the **Fields to Sync** column next to the desired object to

a. Click the button in the **Fields to Sync** column next to the desired object to open the **Fields to Add** palette.

b. Click on each property and field to be updated for the object. All changes are saved upon clicking a property or field.

> The Assessment's focus object cannot be updated. Nor can any relationships, references, roles, attachments, images, files or web links related to an assessment.



The Fields to Add Pallette.

7. To edit an existing assessment 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. Adjust the workflow states, triggers, transitions, and actions as needed.
8. To create a new workflow for object types **not** flagged as reference data, click **New** in the

row for the relevant object type.