

Scope & Launch Overview

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Overview

Scope and Launch are important terms to understand when creating an Assessment. These terms are outlined below:

Related Information/Setup

For information on the role of an administrator in the scope and launch of an assessment, see the [Scope & Launch Requirements](#) article.

For information on the role on an end-user in completing an assessment, see the [Scope & Launch/Create an Assessment](#) article.

Using large data sets (e.g., compliance frameworks, over 2000 scoped objects, etc.) within an assessment may create timeouts and cause errors. Please refer to the [Scope and Launch Thresholds and Best Practices](#) article for best practices on how to alleviate these potential issues when using large sets of data.

Scope

A **Scope** refers to objects or instances used to design or create an assessment.

A user creates a basic assessment by entering a name, selecting a **dimension**, and adding fields to the assessment form. After the assessment is moved out of the **Creation** state, the user clicks the **Open Assessment Scoping** form action to select objects and instances from the assessment **focus** object type(s).

The screenshot displays the 'Q3 2018 Assessment: Toronto' interface. At the top, there are tabs for '2018 - Q3 - Time Period' and 'Toronto - Business Unit', along with an 'EDIT ASSESSMENT DETAILS' link. Below this is a brief instruction: '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.'

The interface is divided into two main sections. On the left is a 'Filters' sidebar with the following sections:

- By Name:** A search input field.
- By Assessment Type:** A dropdown menu with 'Select one...'.
- By Dimension:** A dropdown menu with 'Select one...'.
- By Description:** A search input field.
- By Unique ID:** A search input field.
- By state:** A dropdown menu with 'Select one...'.

On the right is the main content area. It features a 'Risk Category' section for 'RC-1 Operational' with an 'ACTIVE' status and a description: '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...'. Below this is a '+ ADD TO SCOPE' button.

Below the risk category is a table of 'ASSESSMENTS':

| Assessment Name | Time Period | Location | Status | Action |
|---------------------|-------------|----------|------------|-------------------|
| 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 |

At the bottom of the table is a 'LOAD MORE' link. Below the table is a pagination control showing 'Page 1 of 1 (1 to 1 of 1 items)'. At the very bottom of the interface, a green bar states: 'There are currently 36 objects added and ready for review'.

A Navigation Form Used to Scope an Assessment Before launch

After selecting objects and instances, click the green banner to display the navigation form. The use of [navigation form](#) further filters the data.

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, Resolver recommends using navigation forms under most circumstances. See the [Navigation Form](#) article for more information.

The tree view on the form helps users decide if related objects are relevant and allow them to add or remove those objects from the assessment. Depending on the user's [permissions](#), the navigation form enables users to review and edit an object through a palette.



Navigation Form to Allow Further Refinement

Launch

Launch: Refers to a fully created assessment.