

Open Assessment Scoping Form Action

Last Modified on 04/19/2022 11:22 am EDT

The **Open Assessment Scoping** form action provides access to the [scoping tool](#) where users can review, filter, and add focus objects to complete the launch of an assessment. This action requires the use of a [navigation form](#) created for the same object type as the assessment [focus](#) or with the same [data definition](#) as the assessment.

This action can be added to standard forms for assessments. However, the action will not be displayed until the assessment is moved out of the creation state.

Risk Assessment Review

Risk 33

Risk Assessment Name
Risk 33

Time
Q2

Business Unit
Edmonton

ADD PROCESSES

RISK 33

Q2 - Time | Edmonton - Business Unit

EDIT ASSESSMENT DETAILS

Add a Process to your assessment from the list below. If it's necessary, you can add multiple Processes to focus on. You'll be able to perform more granular scoping before you confirm the scope of your assessment.

Filters

By Name
Q

By Assessment Type
Q Select one...

By Dimension
Q Select one...

By Description
Q

By Unique ID
Q

By state

P-3 CORE-10097 PROCESS 1-1
Library DEFAULT + ADD TO SCOPE
PAST ASSESSMENTS



P-1 EXTEND OUR REACH AND INFLUENCE
Library DEFAULT + ADD TO SCOPE
PAST ASSESSMENTS

P-3 DELIVER AN EXCEPTIONAL CUSTOMER EXPERIENCE

There are currently 0 objects added and ready for review

Clicking on the *Open Assessment Scoping* form action on an existing assessment opens the *scoping tools* where *focus objects* can be added.

To add the Open Assessment Scoping action to a form:

1. Ensure the appropriate [data definition](#) and [navigation form](#) has been created.
2. If the form is not already open, click the  icon in the top bar > **Configurable Forms** in the **Views** section, then select the appropriate form.
3. Click the  icon in the **Actions** section of the **Form Elements** palette to expand it.
4. Drag and drop the **Open Assessment Scoping** element to the canvas, which will automatically display the **Add Component** screen.
5. Enter text to display on the clickable button in the **Button Text** field.
6. Select a [navigation form](#) from the **Navigation Form** dropdown menu. The options in this menu are navigation forms with the same object type as the assessment focus or with the same data definition.

Add Component ✕

Button Text


Start Scoping

Navigation Form

QCA - Nav for Scoping ▾

SAVE **CANCEL**

The Add Component screen for the assessment scoping form action.

7. Click **Save** to return to the canvas.
8. To edit the action, hover your cursor over the element on the canvas, then click the  icon.