

## Scope & Launch User Interface

### Scoping Tool

The screenshot shows the 'Q3 2018 Assessment: Toronto' scoping tool interface. It features a header with the assessment name and an 'EDIT ASSESSMENT DETAILS' link. Below the header is a section for adding risk categories, followed by a list of filters (By Name, By Assessment Type, By Dimension, By Description, By Unique ID, By state). The main area displays a list of 'Operational' risk categories with associated assessment instances, each with 'ADD TO SCOPE' and 'REMOVE FROM SCOPE' buttons. A footer banner indicates that 19 objects are currently added and ready for review.

*The scoping tool. This page is accessed by clicking an Open Assessment Scoping action on an assessment form.*

1. The name of the assessment.
2. The **Edit Assessment Details** link. Clicking this link will return you to the assessment to edit or add information to the form.
3. The assessment's **dimensions**. These selections cannot be modified.
4. Filters that can refine the objects and **instances** displayed on the page.
5. **Focus** objects that can be added to the assessment.
6. The **Add To Scope** and **Remove From Scope** buttons to add or remove objects and instances from the assessment.
7. Instances of the object (past assessments) that can be added to the scope. If there are no existing assessment objects, this section will be hidden. Hovering your cursor over the ellipsis next to an instance will display its unique ID and the date it was created.
8. Displays the current number of objects and instances added to the scope (either directly by clicking the **Add To Scope** link or through relationships or references based on the assessment's **data definition**). Clicking this banner will display the navigation form.

### Navigation Form



*The assessment navigation form, which is accessed after adding objects and instances to the scope.*

1. Displays the current number of objects and instances added to the scope from the scoping tool and through relationships and references. Clicking this banner will return you to the scoping tool.
2. Clicking this icon will display the available filters, based on the object type, that can be applied to refine the objects displayed in the tree.
3. Additional objects that can be added or removed from the scope of the assessment, which appear based on the assessment's/navigation form's data definition. Clicking the + icon will expand the nodes to reveal relationships or references on a selected object, while clicking the - icon will collapse the nodes. Deselecting a checkbox beside an object will remove it and the relationship and reference objects below it from the scope. Depending on your role's [permissions](#), clicking an object's monogram or name in the tree will display the object's form in a palette.
4. Saves the selection of objects and instances added to the scope and launches the assessment. If an admin has enabled the option to [reuse data](#) from other assessments and users have permission to access those objects, clicking **Confirm Scope > Review Objects** will display an additional page to review and select that data before the assessment is launched.
5. The assessment details, including its name and dimensions.

## Review Objects

For more information on reusing previously assessed data, see the [Link to Existing \(Rely On\) Assessment Data](#) article.

**Review Objects**

Please determine whether you want to create a new version or link to the results of existing assessments.  
Note: **Create New Version** is selected by default

**Filters** 1

**By Name**

**By Unique ID**

**Global Assessment Selection** 2

Note: Selecting an option here will apply that assessment's results to all listed objects

ASSESSMENTS ^

CLEAR SELECTION

3 ... Operations BU Risk ... OPERATIONS  Link to Existing

BU Risk A... CORPORATE  Link to Existing

**Assessment Type**  
Risk Assessment

**Unique ID**  
RA-2

**Created On**  
Mar 25, 2020

Create New Version

ASSESSMENTS ^

... Operations BU Risk ... OPERATIONS  Link to Existing

**RC-1 Information Technology**  Create New Version

ASSESSMENTS ^

4 ... Operations BU Risk ... OPERATIONS  Link to Existing

... Corporate BU Risk A... CORPORATE  Link to Existing

5

BACK TO SCOPING **CONFIRM**

1. Available filters to refine the **instances** displayed.
2. The **Global Assessment Selection** section. From here, you can globally select which instance(s) to rely on (reuse from another assessment) instead of selecting an option each for instance individually.
3. Hovering your cursor over the ellipsis icon beside an instance displays additional information, including its **Assessment Type**, **Unique ID**, and **Created On** date.
4. Individual objects that can be added to the assessment. You can choose the **Link to Existing** option or leave the **Created New Version** option selected. You can overwrite **Global Assessment** selections for individual objects by expanding them in the results and choosing an alternate option, but note that doing so will display a notification banner.
5. Clicking **Confirm** displays a summary of the objects added to the assessment, including the number of linked existing objects and new versions. Once confirmed, the assessment will be launched and no further changes can be made.