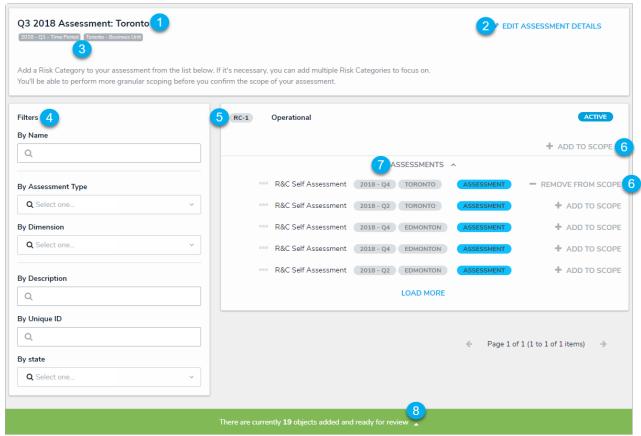


Scope & Launch User Interface

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Scoping Tool



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.
- 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



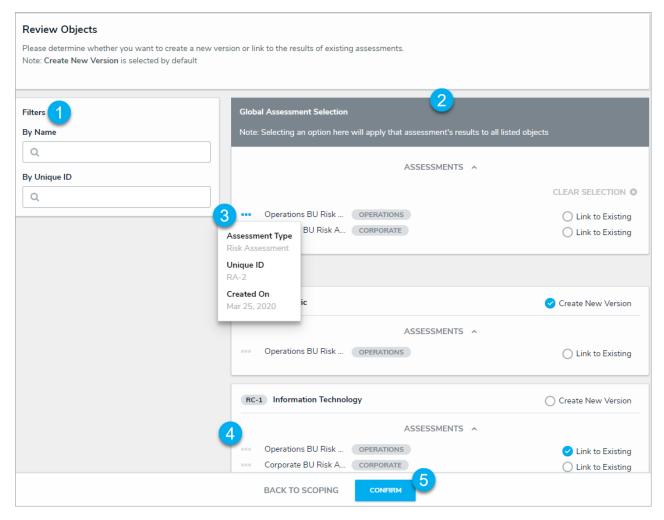
The assessment navigation form, which is accessed after adding objects and instances to the scope.

- 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.





- 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.