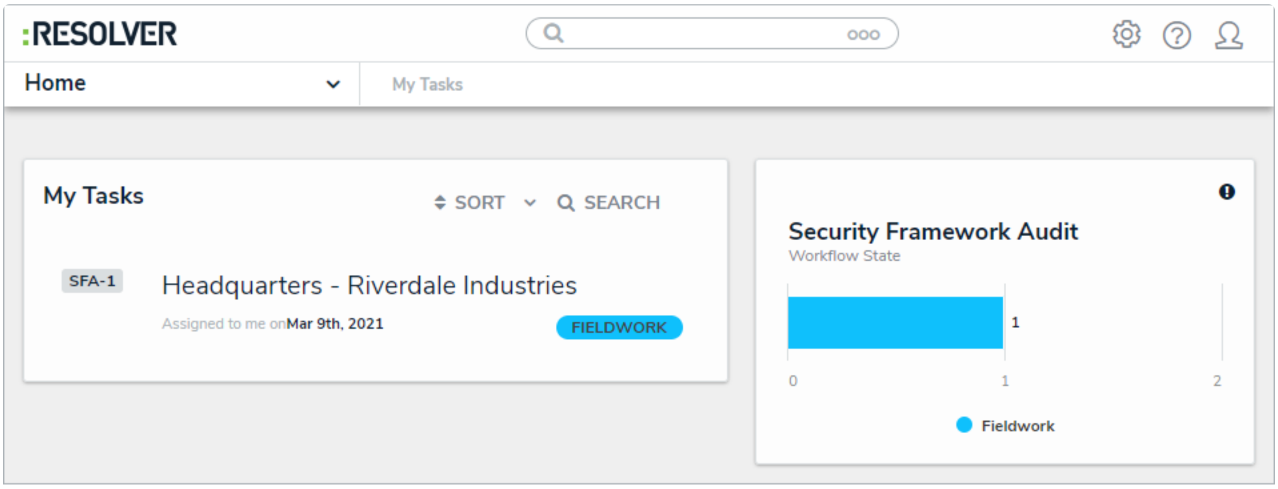
Finalize Fieldwork

Last Modified on 11/15/2024 2:45 pm EST

Once an assessment has been launched, members of the **Security Audit Fieldwork** user group can then access it and either complete each of its requirements, or attach issues and corrective actions. Once the fieldwork has been finalized, it will then be sent to the **Review** workflow state to be closed by a member of the Security Assessment Team user group. If it was set to be recurring, it will be reassigned to the same auditor in the **Fieldwork** phase at the date set in its **Expected Start Date** field next year. GS: I couldn't find the framework workflow, but is this correct?

All assigned assessments appear on the My Tasks page. GS: The **Fieldwork and Review** form only appeared when I was a member of the Security Assessment Team user group. Using just the Security Audit Fieldwork user group gave me a read-only form. Is the user expected to belong to both user groups?

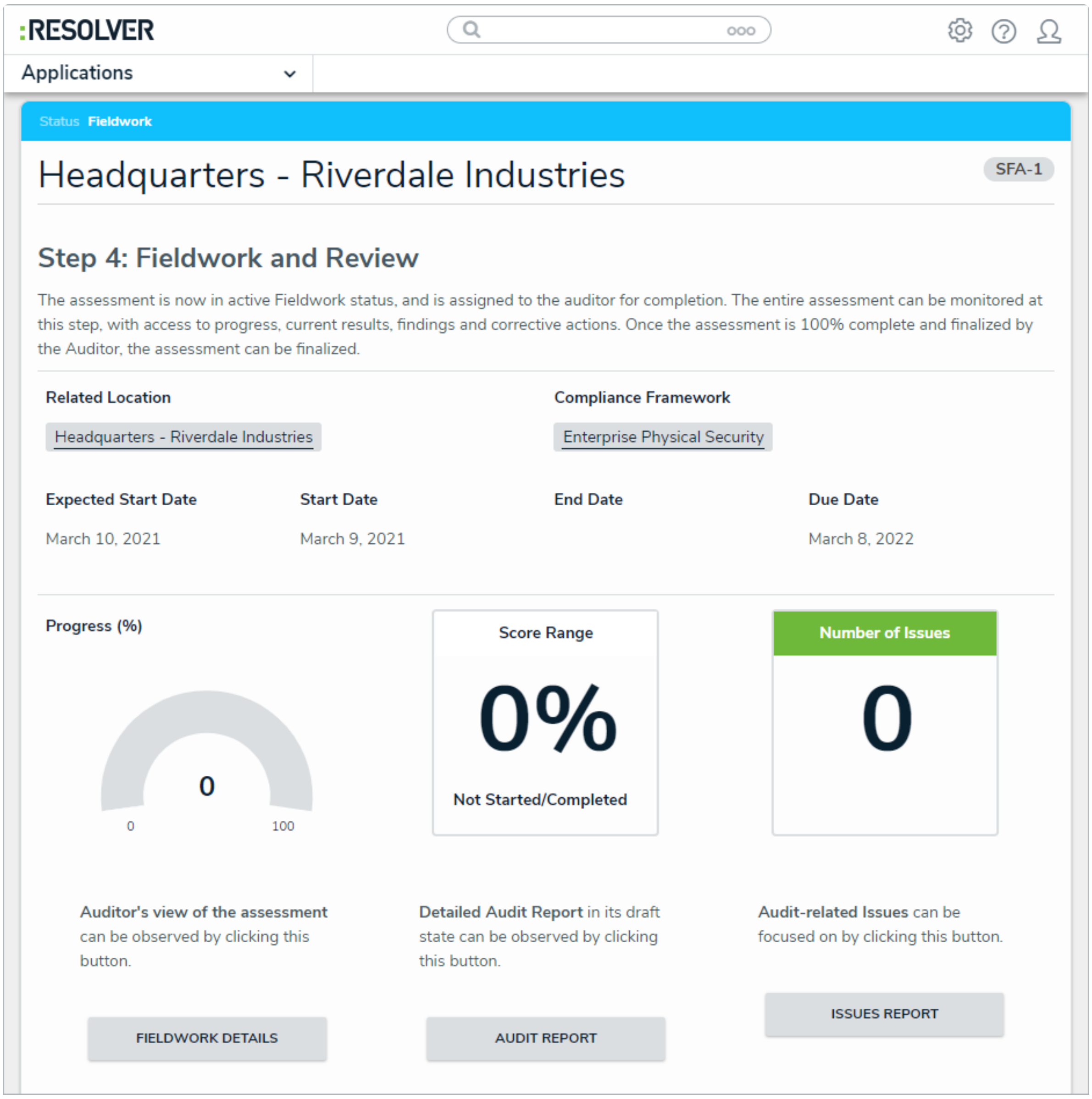


An assigned assessment on the My Tasks page.

While the steps below explain how to close an assessment in one sitting, it is likely that most assessments will take several days to complete.

To complete an assessment:

1. Log into a user account that's been added to the **Security Audit Fieldwork** user group to display the **My Tasks** page.
2. Click an assessment in the **Fieldwork** workflow state to open the **Fieldwork and Review** page.

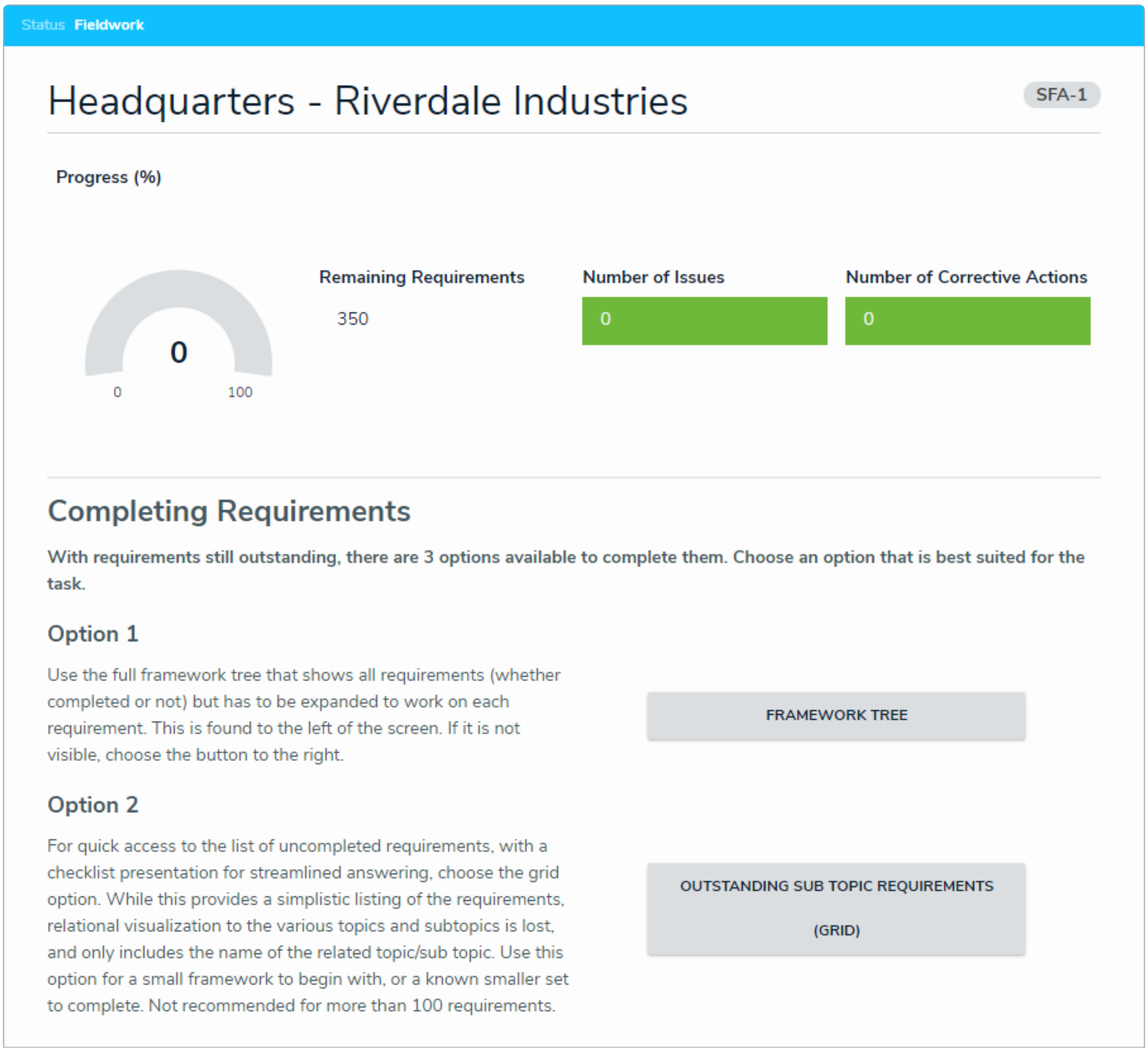


The Fieldwork and Review form.

3. **Optional**: Click **Audit Report** to view a report summarizing the assessment, including the frameworks being used, requirements with findings, and issues attached to the assessment.

4. **Optional**: Click **Issues Report** to view a report summarizing all the issues attached to the assessment.

5. Click **Fieldwork Details** to open the **Fieldwork Details** form.



The Fieldwork Details form.

6. Access the **Requirement Assessment** form for any of the outstanding requirements attached to the assessment using one of the following three methods:

    - **Framework Tree**: Use the navigation tree on the lefthand side of the screen to navigate to the desired requirement

    - **Outstanding Sub Topic Requirements (Grid)**: Display a data grid showing all currently incomplete requirements by topic and sub-topic. Click on a requirement to access it; or

    - **Outstanding Requirements Report**: An exportable report that lists each incomplete requirement attached to the assessment.

7. On the **Requirement Assessment** form:

    a. Select whether or not the requirement is being met by the company or if there are conditions that must be met from the **Meets Requirement** dropdown list.

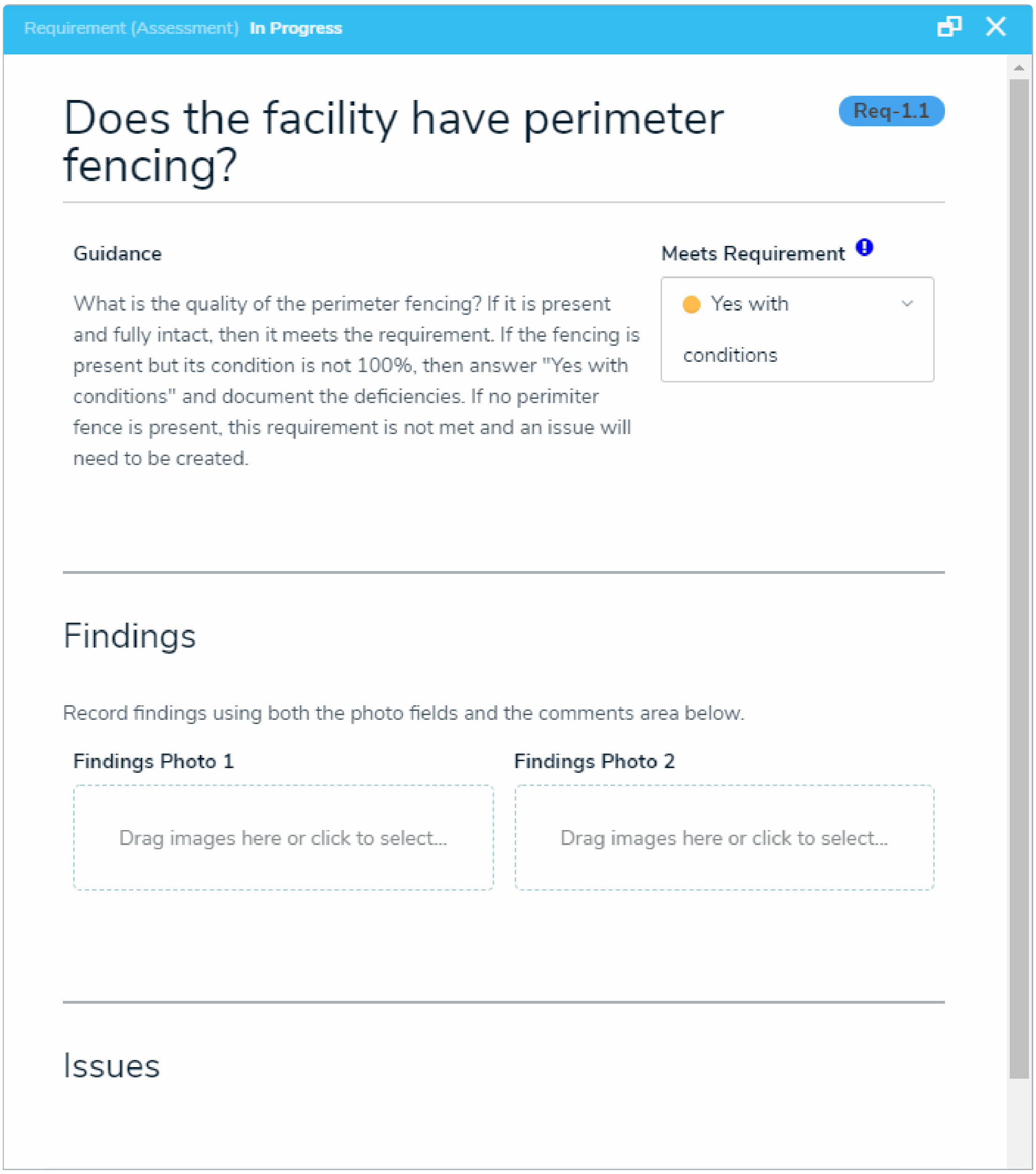
    b. Drag an image file to or click the **Findings Photo** fields to add an image file to the requirement.

c. In the **Issues** section an existing contributing issue can be added by clicking **Add Existing Issue**, typing its name in the search bar, and selecting it. To create a new issue from scratch, click **+ Create New** and fill in the required fields. See the Review an Issue article for more detailed information on filling out this form. GS: I tried adding myself to a variety of user groups (the security assessment team, incident administrator, issue owner, and requirement owner (making sure I was assigned to the specific incident) and the Issues section would not populate. Is this a problem with the form, the org I'm using, or is there something I'm doing wrong?

> This section will only appear when the user has selected **Yes With Conditions** or **No** from the **Meets Requirement** dropdown list.

d. **Optional**: Add comments, as needed.

e. Once the company meets the requirements, or an issue has been added, click **Complete**.



The Requirement Assessment form.

8. Once all of the assessment's requirements have been marked as complete, return to the **Fieldwork Details** form and click **Finalize Field Work** to move the assessment into the **Review** workflow state. GS: Is this true, or is there a way to move the assessment to review if some of the requirements are not met?