

Rely On Shared Objects in a Relationship Table

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The ability to share previously assessed objects on an [Advanced Relationship](#) table can be used by Risk owners and Requirement owners in the Risk Management or Compliance Management apps. Example use cases include:

- **Risk and Compliance:** A Risk Owner from Business Unit 1 documents Controls in relation to their Risk. This user is also a Requirement Owner in the Compliance app, and they need to attest to a Requirement that relies on the same Control they documented for the Risk Management team. Therefore, they need to rely on their existing Control in a relationship because it operates the same way in relation to the Risk and Requirement.
- **Compliance:** A Requirement Owner from Business Unit 1 documents Controls in relation to their Requirements. Another Requirement Owner in Business Unit 2 can draw from the list of existing Controls and rely on the results of the Business Unit 1 Control in a relationship without creating a new version.



This option is not available on reference tables.

Before this feature can be used, the following requirements must be met:

- The **Option to Link to Existing** toggle beside an object type from the **Configuration** tab of the **Edit Assessments** page is enabled. See the [Assessments Workflows](#) section for more information;
- The object the user is trying to link is a clone object and its parent is also a clone object, (i.e., not a Library object); and
- The parent and child objects are not linked to the same Assessment object; and
- The **Enabled Advanced** option is enabled on a relationship element on a configurable form.

Once these conditions are met, clicking **+Add** in the **Assessments** section on the palette will display the option to **Link to Existing** (link to previously assessed data) or **Create New Version** of the object in the **Assessments** section on the relationship table.

✕
ADD EXISTING CONTROLS

Showing 50 most recently created Control
 If you don't see what you were searching for, try searching from all Controls above.

C-62.1 Privacy Policy
SELF ASSESSMENT

+ ADD

C-51 Critical documentation has been identified and is stored in a secure facility
ACTIVE

Critical documentation has been identified and is stored in a secure facility. Authorized personnel should be identified to determine who can access the documents.

+ ADD

ASSESSMENTS ^

⋮ Risk Assessment
 BUSINESS UNIT 2
SELF ASS

+ LINK TO EXISTING

⋮ Risk Assessment
 BUSINESS UNIT 2
SELF ASS

+ CREATE NEW VERSION

⋮ Risk Assessment
 BUSINESS UNIT 1
SELF ASSESSME...

+ ADD

⋮ Risk Assessment
 BUSINESS UNIT 2
SELF ASSESSME...

+ ADD

C-52 Establish and distribute a standard operating and procedures manual
ACTIVE

Establish and distribute a standard operating and procedures manual to document specific procedures.

+ ADD

ASSESSMENTS v

Options for adding previously assessed data on a relationship table.

Assessment objects will also display the dimensions and current workflow state. If the assessment has multiple dimensions, a + icon and the number of additional dimensions (e.g., +1) can be clicked to display those dimensions.

C-52 Establish and distribute a standard operating and procedures manual
ACTIVE

Establish and distribute a standard operating and procedures manual to document specific procedures.

+ ADD

ASSESSMENTS ^

⋮ Risk Assessment
 BUSINESS UNIT 1
+1
SELF ASSESSME...

+ ADD

⋮ Risk Assessment
 BUSINESS UNIT 1
SELF ASSESSME...

+ ADD

⋮ Risk Assessment
 BUSINESS UNIT 1
SELF ASSESSME...

+ ADD

⋮ Risk Assessment
 BUSINESS UNIT 2
SELF ASSESSME...

+ ADD

An assessment with multiple dimensions.