Assessments

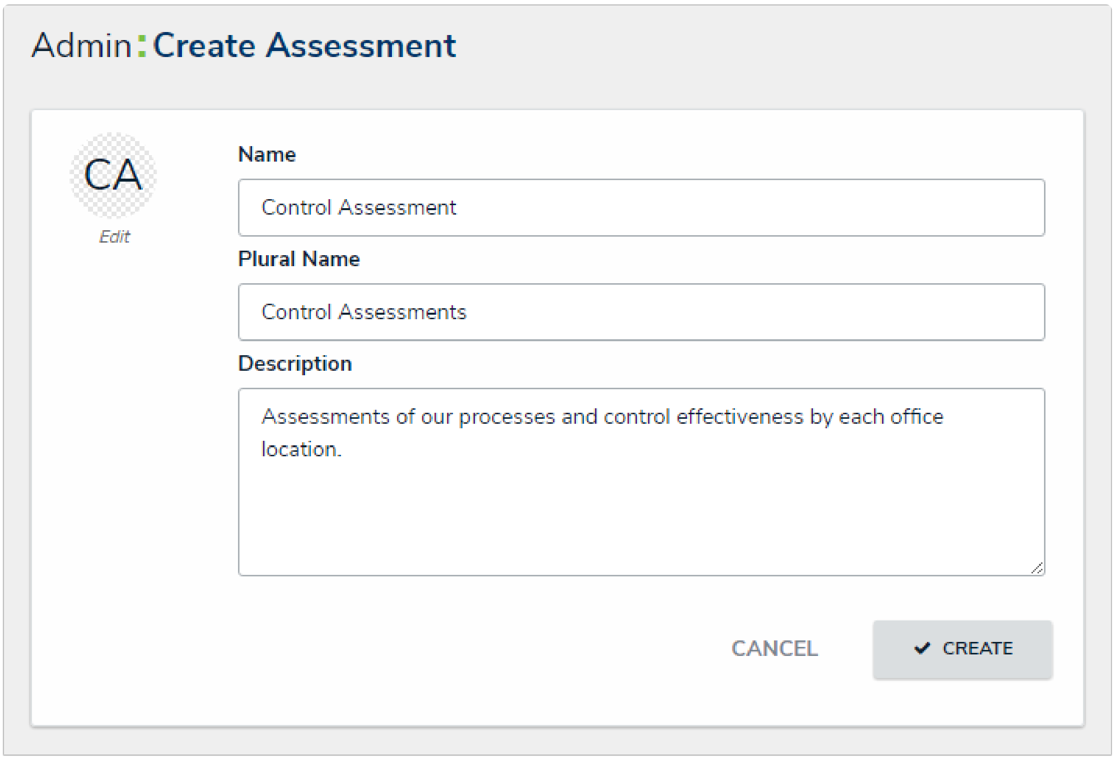
Last Modified on 11/22/2021 11:05 am MST

Create a New Assessment Type

Once an assessment type has been created, you can add it to data visualizations, object type groups, relationships, roles, configurable forms, actions, and views.

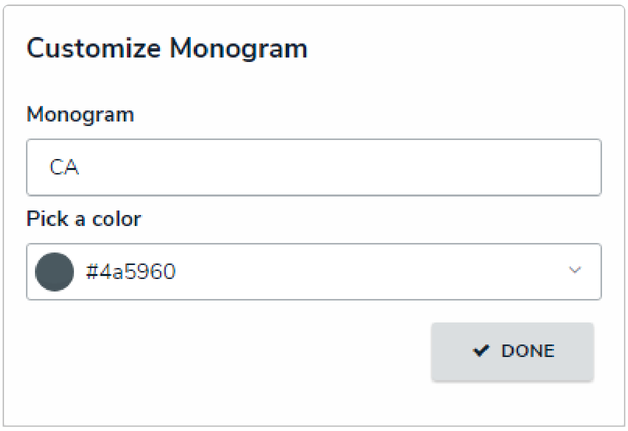
To create a new assessment type:

1. Click the icon in the top bar > **Assessments** in the **Data Model** section.
2. Enter a name for the assessment in the **Name** field.
3. **Optional**: Enter a plural name for the assessment type in the **Plural Name** field, which will appear when viewing a list of the objects for the assessment (e.g., "View Control Assessments" instead of "View Control Assessment").
4. **Optional**: Enter a description of the assessment type in the **Description** field, which will appear on the **Assessments** and **Edit Assessment** pages.



The Create Assessment page.

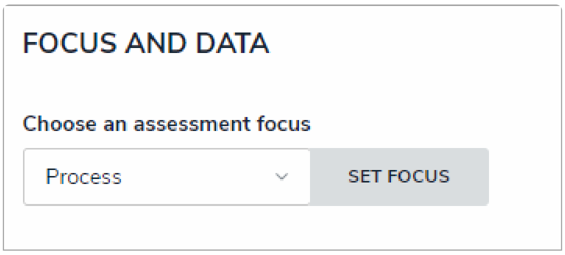
5. **Optional**: To edit the assessment monogram:
    1. Click the monogram icon to the left of the **Name** field.
    2. Enter 1 to 3 characters in the **Monogram** field.
    3. Click the **Pick a color** dropdown menu to reveal the color picker. You can also type a hex color into this field to select a color.



The Customize Monogram screen.

    4. Click **Done**.

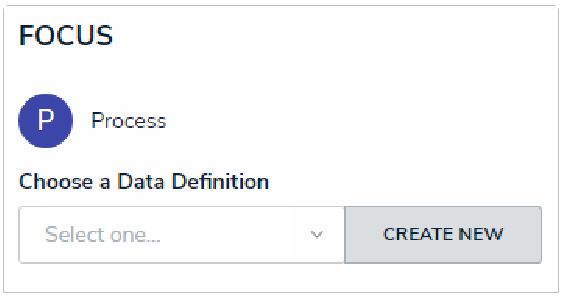
6. Click **Create** to display the **Edit Assessment** page.
7. Select an object type to use as the assessment's focus from the **Choose an assessment focus** dropdown menu. The focus object type determines which object types you can select when creating or selecting a data definition.
8. Click **Set Focus**.



The Focus dropdown menu. The object type selected here will determine which data definition can be selected for the assessment.

> Once you've clicked **Set Focus**, you cannot modify your selection.

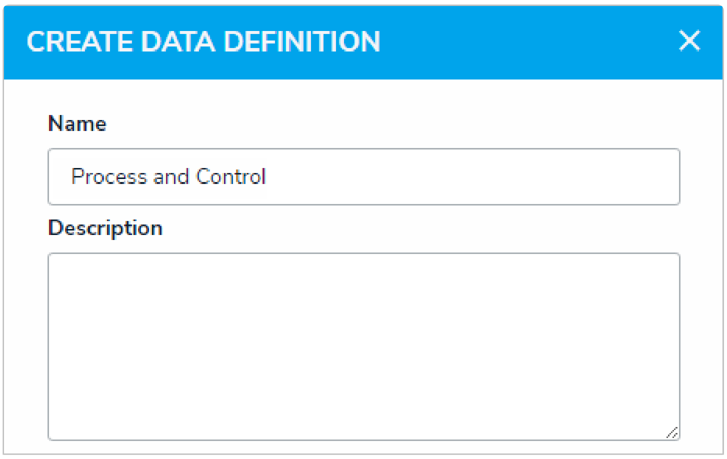
9. To choose an existing data definition, select it from the **Choose a Data Definition** dropdown menu.
10. To create a new data definition:
    1. Click **Create New** to open the **Create Data Definition** panel.



The Data Definition section, which appears after selecting a focus.

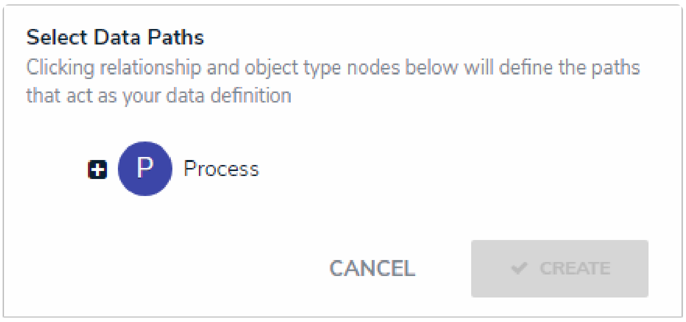
    2. Enter the name for the definition in the **Name** field.
    3. **Optional:** Enter a description for the definition in the **Description** field. This description

will appear when reviewing the Data Definition settings.



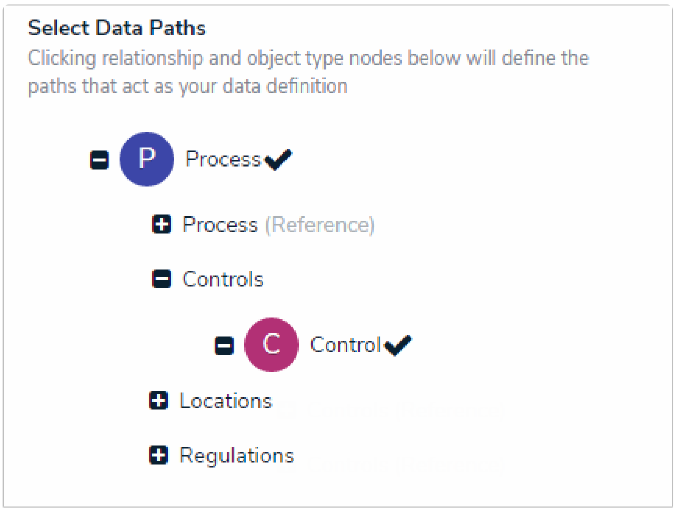
The Create Data Definition screen.

4. Click the monogram, which represents the focus object type you're currently working in, to expand the node and any reveal relationships and references saved to the focus object type.



The Data Path with no object types selected. Clicking the monogram of the focus object type will expand the tree to show all the relationships and references.

5. Click a relationship or reference to show the related object types (e.g. clicking the "Controls" relationship will reveal the Control object type).
6. Click an object type to place a checkmark next to it and add the object type to the data definition. Any object types selected in the data definition can be used as dimensions or reference data on the assessment. For example, if you selected Process as the focus and Control in the data definition, both Process and Control can be added as dimensions.

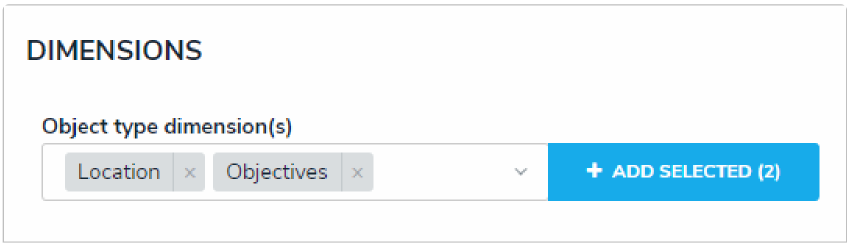


Selecting object types on a new data definition. The object types selected can then be used as dimensions or reference data.

7. Continue placing checkmarks beside the object types as needed.
8. Click **Create** to close the palette.

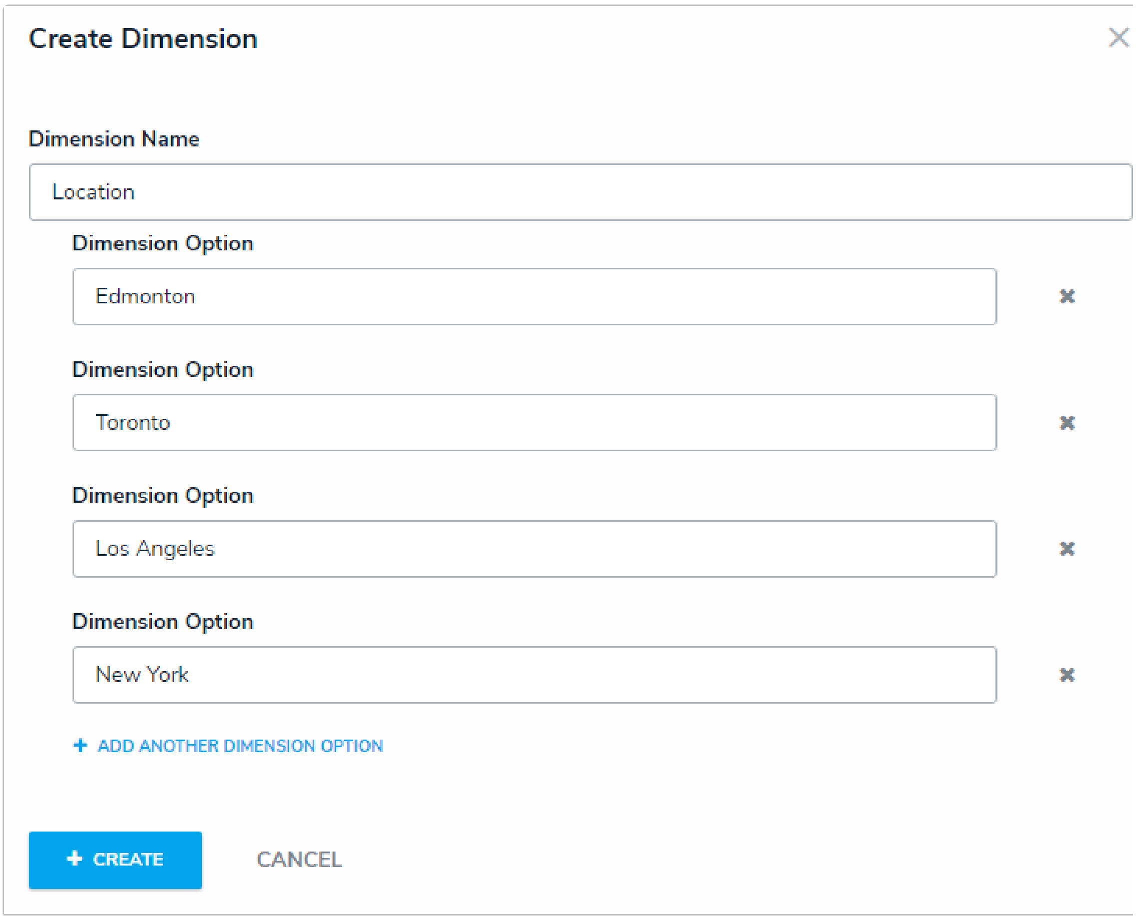
> You can review the data path of the definition from the Data Definitions section in **Administration**.

11. To create a dimension from an existing object type (that will appear on the assessment as a field through which users can select an existing object):
    1. Click the dropdown menu below **Object Type Dimension(s)**, then select one or more object types that you want to appear on the assessment (e.g., selecting the Location object type will add fields on the assessment through which users can only select existing Location objects).
    2. Click **Add Selected**.



Adding object type dimensions to an assessment.

12. To create a custom dimension, which will appear on the assessment as a dropdown menu with predefined options (like a select list) and will **not** allow users to select existing objects:
    1. Click **Create New** from the dropdown menu below **Custom Dimension(s)**.
    2. Enter a name in the **Dimension Name** field (e.g., Location).
    3. Enter the name for an option as it will appear in the dimension (e.g., Edmonton).
    4. Click **Add Another Dimension Option** to continue adding options.



The Create Dimension screen for custom dimensions.

5. Click **Create**.

13. Click the **Configuration tab** to configure the workflows and assessment data. See the Configure an Assessment's Workflows for more detailed information.
14. Click the **Fields** tab to add fields to the assessment.
15. Click the **Formulas** tab to add formulas to the assessment.
16. Click the **Relationships** tab to add relationships to the assessment.

> To help indicate an object type is the focus of an assessment, a relationship between the assessment and the focus object type is automatically created on the assessment, which will then allow you to add a reference on the focus object type, if needed.

17. Click the **Roles** tab to add roles and configure the inferred permissions on the assessment.
18. Click **Done**.
19. Create a navigation form to complete the scope and launch of the assessment.
20. Create a standard configurable form for the assessment, ensuring you've added the Assessment Context element and the Open Assessment Scoping action to the form.
21. Add the assessment to an action so assessment objects can be created through an activity.
22. **Optional**: Add the assessment to a view so existing assessment objects can be viewed through an activity.

Scope & Launch/Create an Assessment

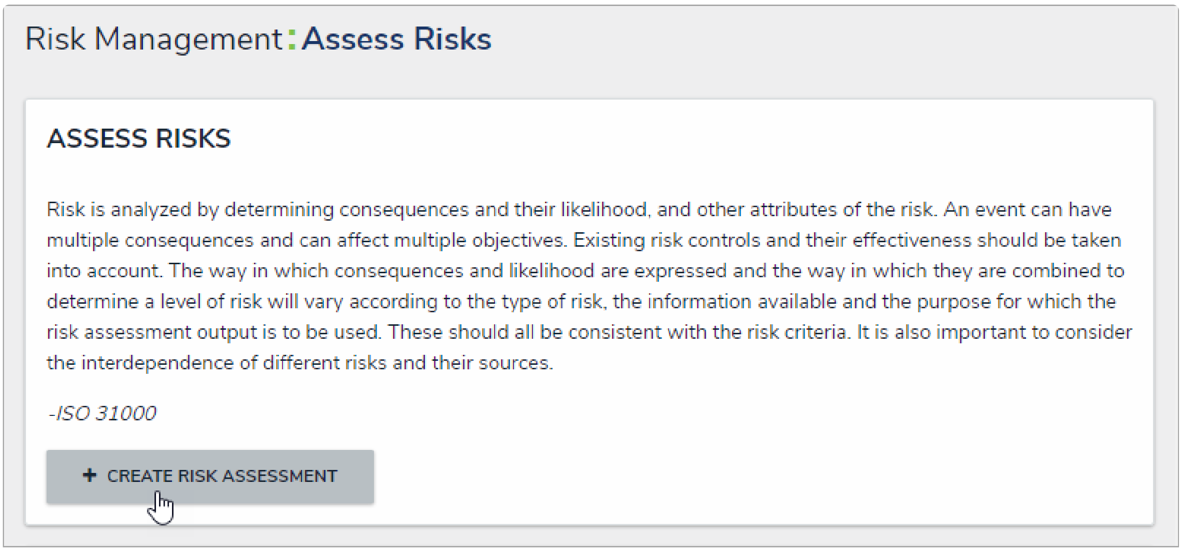
This article provides instructions for creating a new assessment then scoping and launching it immediately after creation. If the assessment was already created, it's possible to scope and launch it by opening it in a view, then following the instructions starting from step 6. If an admin has enabled the option to reuse data from other assessments and you have permission to view those objects, users must review those before the assessment is launched. See the **Review Objects** section below for more information.

For more information on why assessments are scoped and launched, see the Scope & Launch Overview article. To learn more about the user interface of the scoping tool, see the Scope & Launch User Interface article.

> The names of the forms, triggers, objects, etc. in the steps and screenshots below will vary depending on your organization's current configuration.

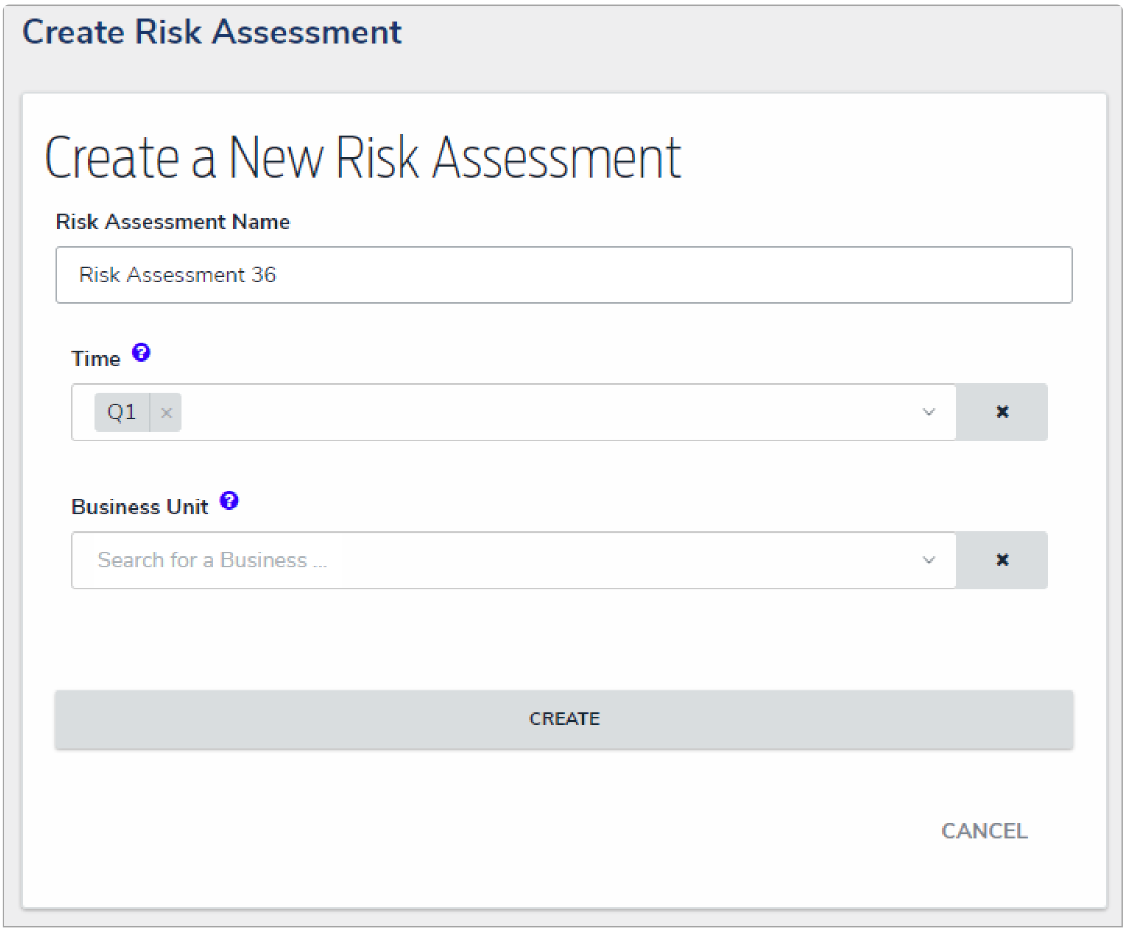
To scope and launch an assessment:

1. Navigate to the application and activity where the **Create Assessment** action is saved.
2. Click the action button to open the assessment form.



An assessment action. Clicking the button will open the assessment form.

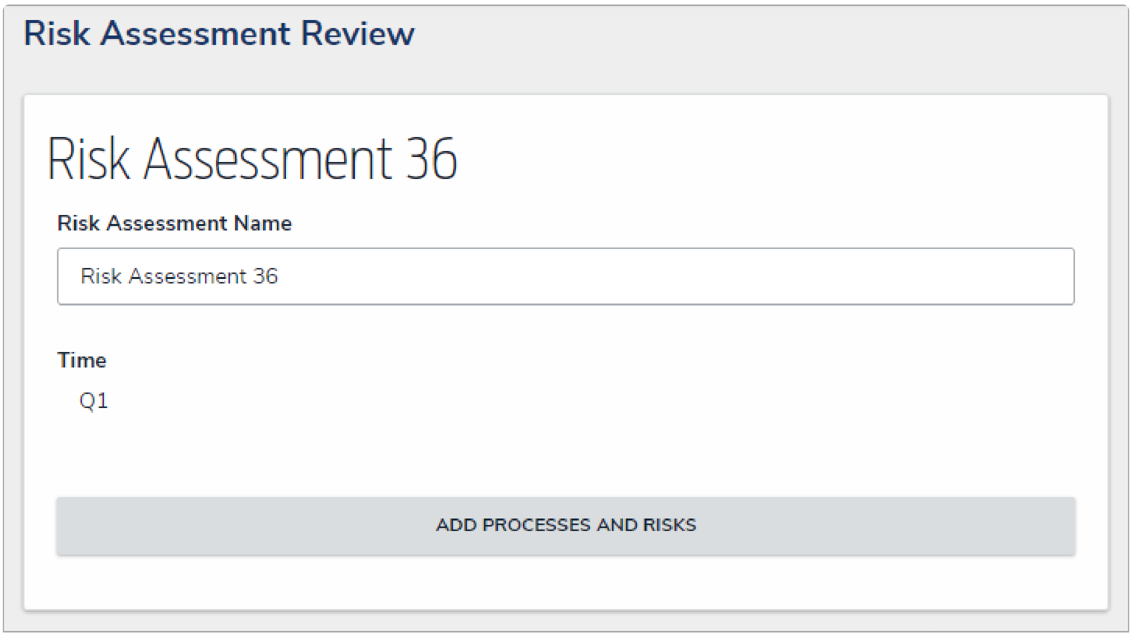
3. Enter a name for the assessment in the **[Assessment] Name** field.
4. Complete one or all of the dimension fields.



A form to create a new assessment.

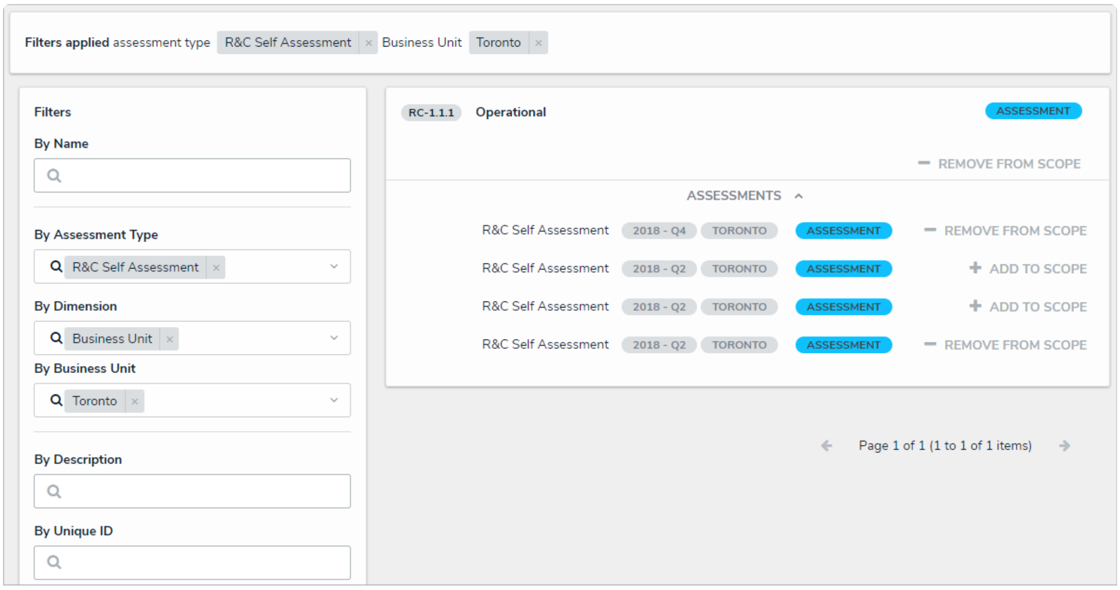
> The assessment dimension fields are marked as required, however, you are only required to complete **one** dimension field before you can create the assessment. Note, however, that any selections made in the dimension fields on this form cannot be undone once the assessment is saved.

5. Click the **Create** trigger to display the assessment review form.



An assessment review form.

6. Click the Open Assessment Scoping action button (*Add Processes and Risks* in the screenshot above) to launch the scoping tool, which will display a list of focus objects that can be added to the assessment.
7. If needed, refine which objects are displayed by using one or more of the following default filters in the **Filters** pane to the left:
   - **Name:** Filters which objects are displayed based on their **Name** property. When entering keywords in this field, press **Enter** on your keyboard to apply the filter.
   - **By Assessment Type:** Filters results by object type or assessment type. For example, in the screenshot below, selecting R&C Self Assessment in the **By Assessment Type** filter will only display objects with instances (assessment objects) that were created through the R&C Self Assessment type. Selecting the **Library** option in this filter will hide any instances. If no instances exist for the object, the **Assessments** section will be hidden automatically.
   - **By Dimension:** Filters which instances are displayed in the **Assessments** section by object type dimension. Once one or more options are selected in the **By Dimension** filter, additional filters are displayed to allow you to further narrow down the results. For example, in the screenshot below, selecting the Time Period and Business Unit object type dimensions displays additional filter options, where you can select specific objects (in this case 2018 - Q4 and Toronto). If no instances exist for the object, the **Assessments** section will be hidden.

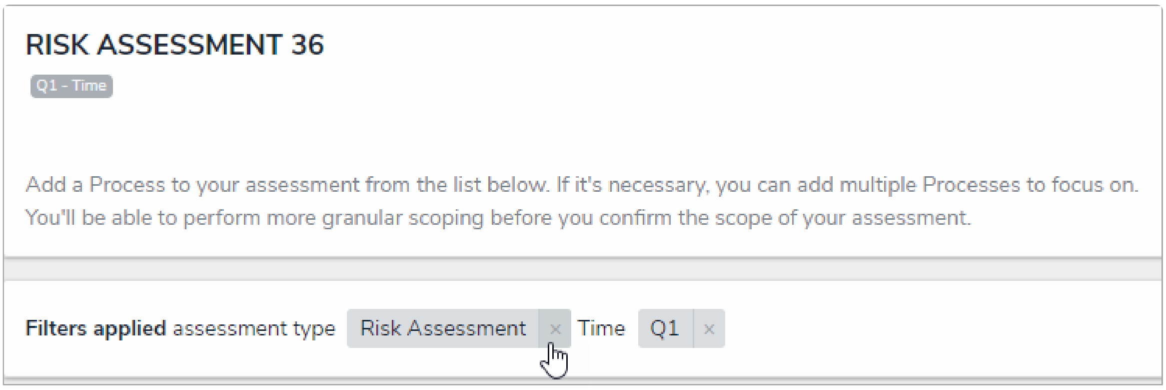


Applying By Assessment Type and By Dimension filters to narrow down the results.

   - **By Description/Unique ID:** Filters objects and instances by their **Description** and **Unique ID** properties.
   - **By State:** Filters objects and instances by workflow state, including states from other assessment workflows.
   - **Other:** Additional filters based on plain text fields, select lists, and multi-select lists added to the focus object type in the assessment. When entering keywords in a text field filter,

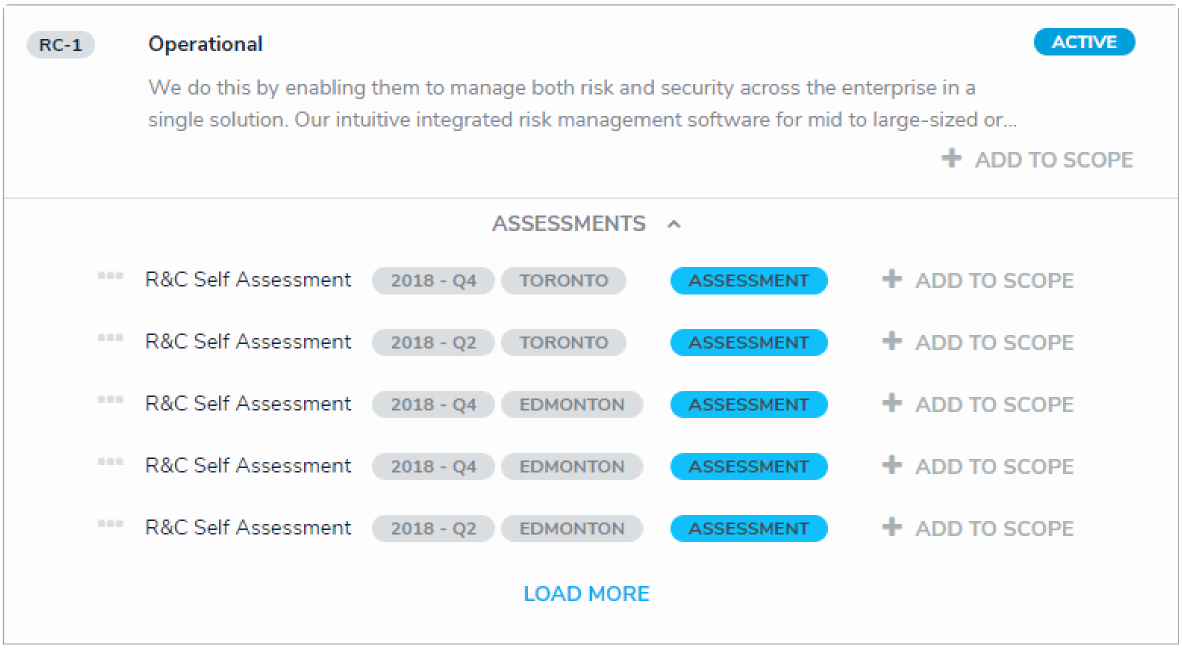
press **Enter** on your keyboard to apply the filter.

8. To remove any unneeded filters, click the **X** beside the filter in the **Filters applied** section.



Removing unneeded filters in the Filters applied section.

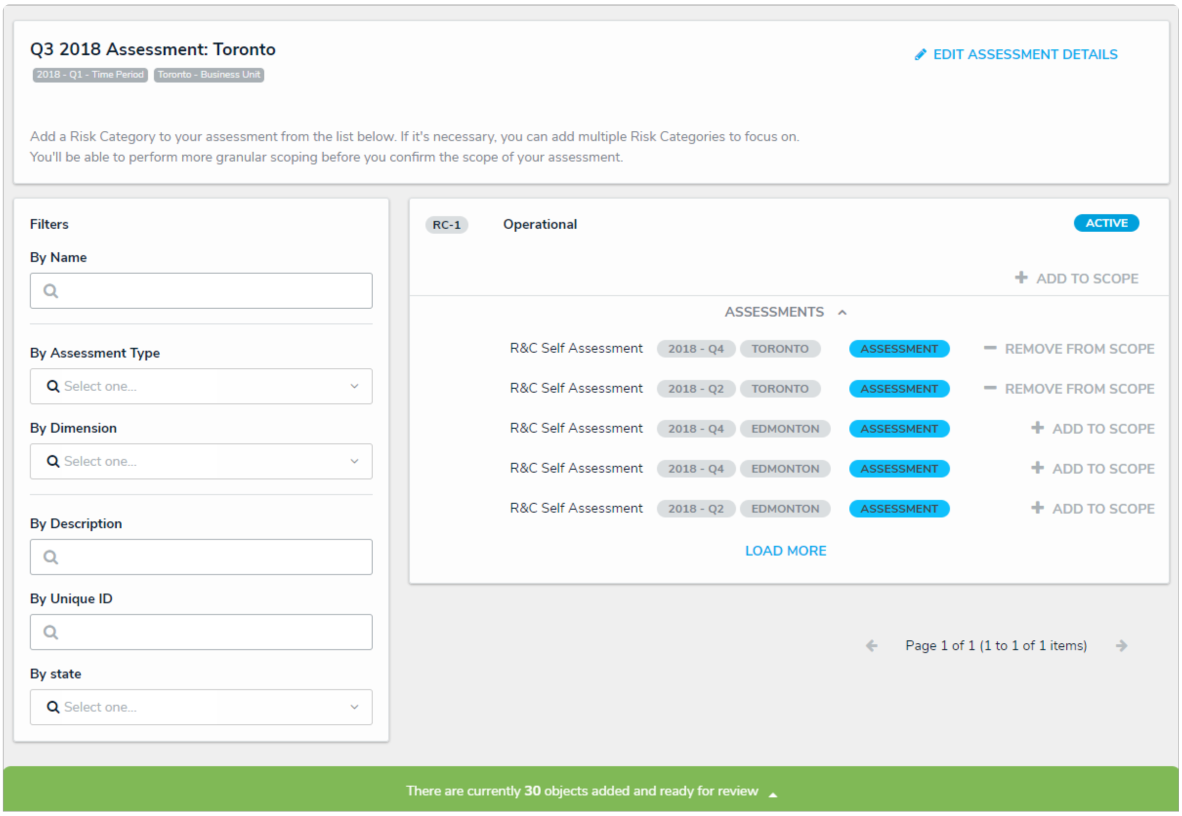
9. **Add to Scope** beside an object to add it to the assessment.
10. To add an instance to the assessment, click the **Assessments** link below an object, then click **Add to Scope**. For more information about an instance, hover your cursor over the ellipsis beside the record.



Clicking the Assessments link below an object will display any instances, which can then be added to the assessment.

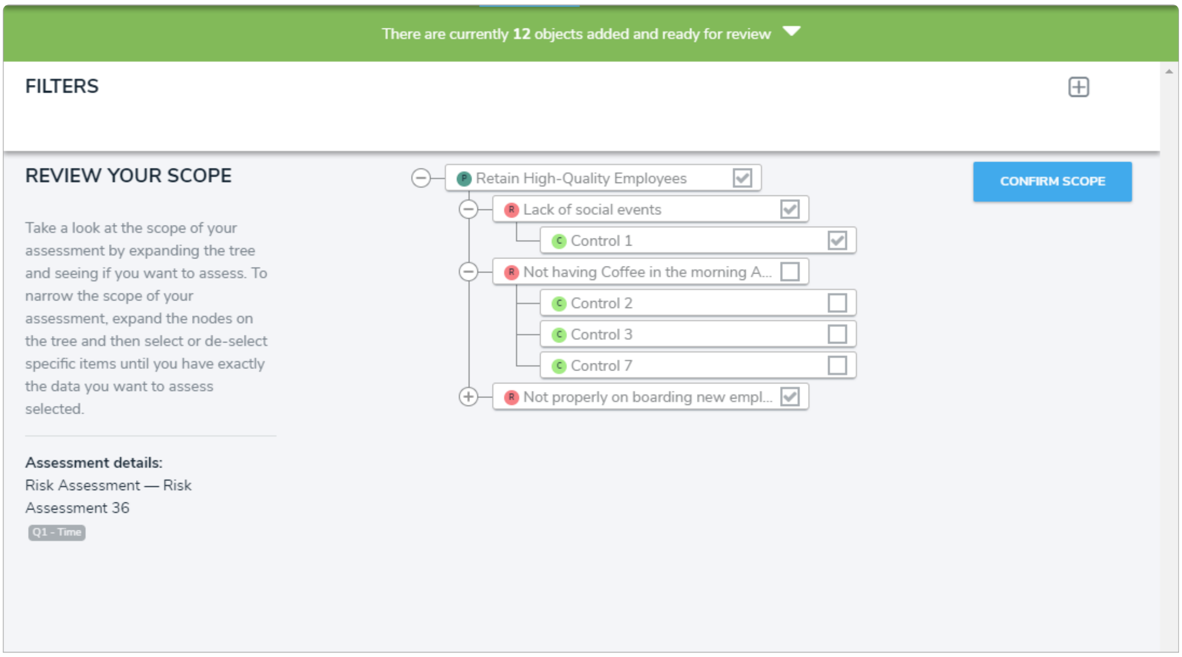
> If an object has not been previously assessed, it will not have any instances and the **Assessments** link will be hidden.

11. Remove any unneeded objects or instances by clicking **Remove From Scope** beside that object or instance.
12. Click the green banner at the bottom of the page to display the assessment navigation form.



Clicking the green banner at the bottom of the page will display a navigation form where you can review and refine the objects and instances added to the scope.

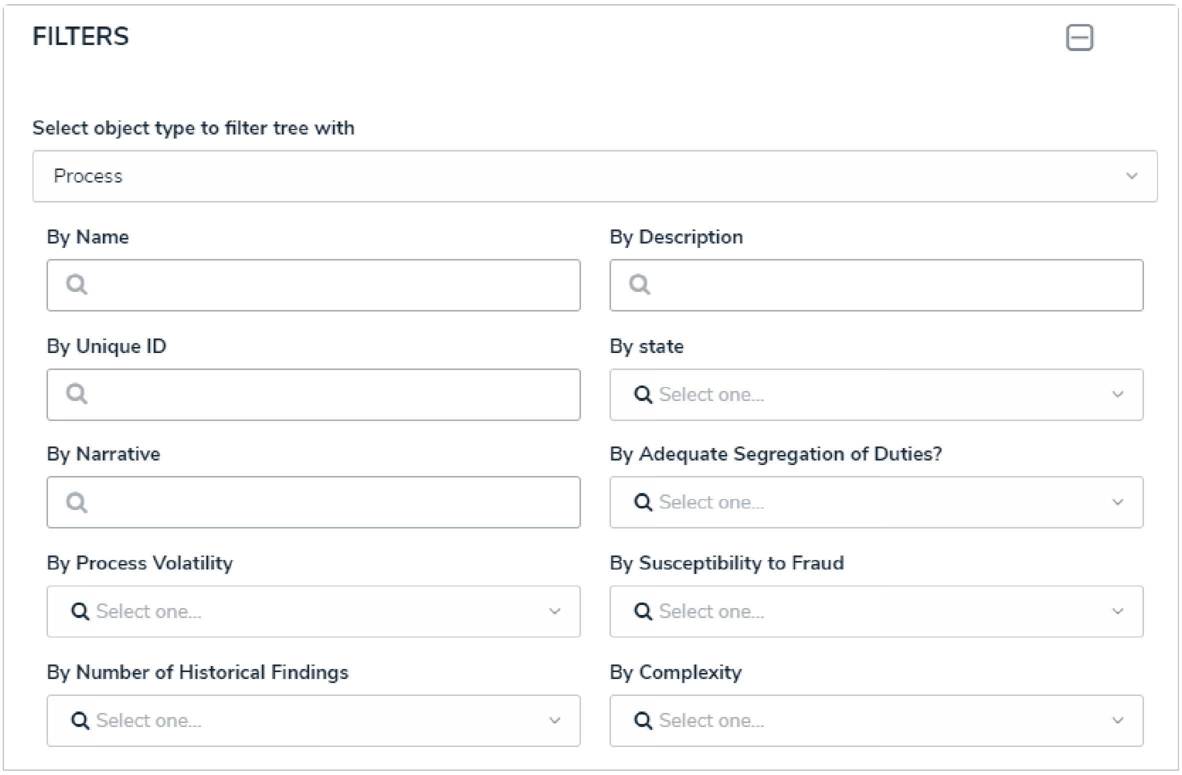
13. Click the icons in the tree to expand the nodes in the tree and display any relationships or references to the objects added to the scope. The objects displayed in the tree are determined by the data definition selected by an administrator.
14. Click the names of the objects in the tree to review them in a palette. You may be able to edit the content in the form, depending on your role's workflow permissions.
15. Deselect the checkboxes beside objects you wish to remove from the scope. By default, all objects and their relationships or references are selected (added to the scope). Deselecting an object in an upper node will automatically deselect the objects in the nodes immediately below it.



Reviewing your scope. De-selecting objects will remove them from the scope.

> Instances cannot be deselected from the navigation form. To remove instances from the scope, click the green banner at the top of the page, then click **Remove From Scope** beside the instances in the **Assessments** sections.

16. To filter which objects are displayed in the tree, click the ⊞ icon, then select an object type in the **Select object type to filter tree with** dropdown menu to show the available plain text, select list, property filters available for that object type. To hide the filters, click the ⊟ icon.



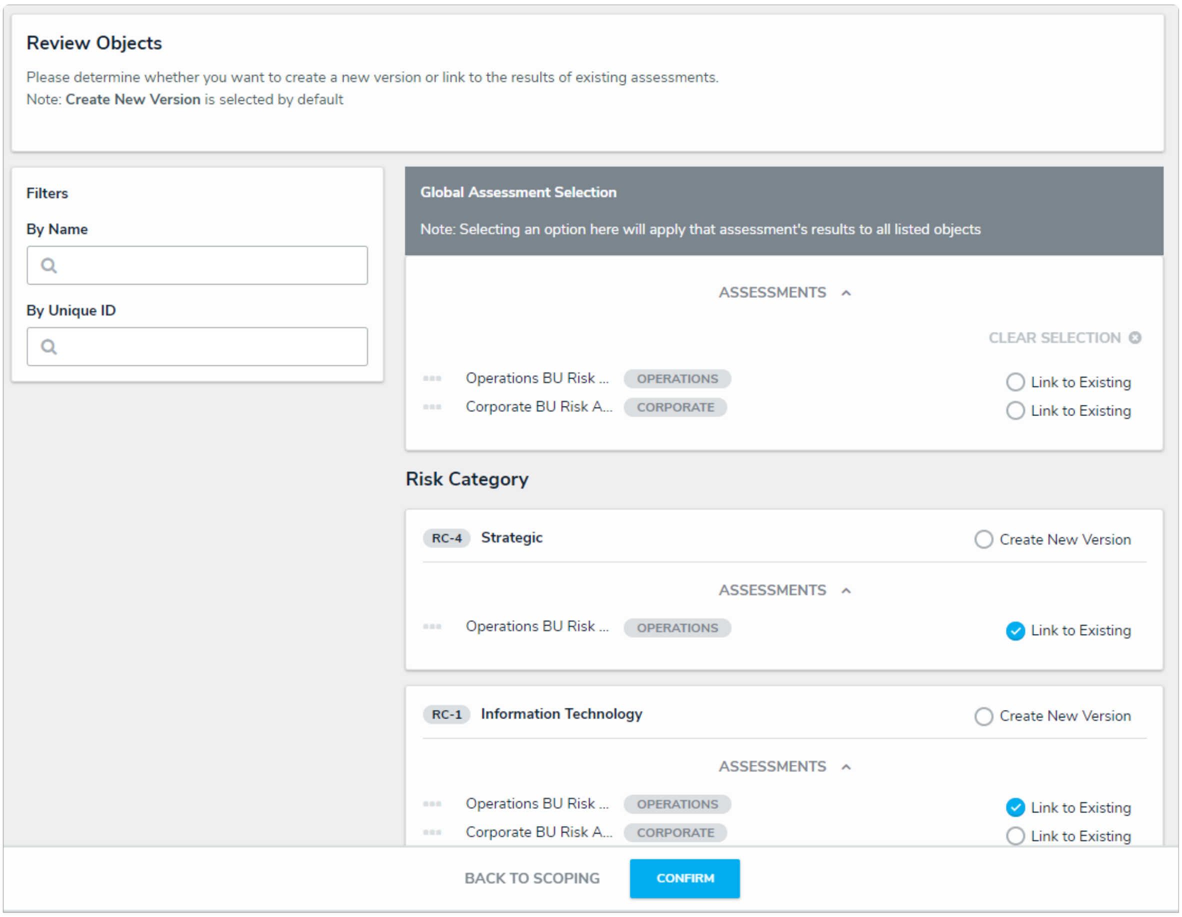
Available filters on the navigation form.

17. Click **Confirm Scope**, then **Yes** to confirm and launch the assessment. If you created the assessment then accessed it later from a view, the form selected for that view will be displayed after clicking **Yes.** Otherwise, the form used to originally create the assessment will be displayed. If an admin has enabled the option to reuse data from other assessments that you have permissions to access, clicking **Confirm Scope > Review Objects** to review the data before the assessment is launched.

Review Objects

For more information on selecting previous assessment data, see the Link to Existing (Rely On) Assessment Data article.

1. Click **Confirm Scope** to display the **Review Objects** page.
2. Apply the **By Name** or **By Unique ID** filters as needed.

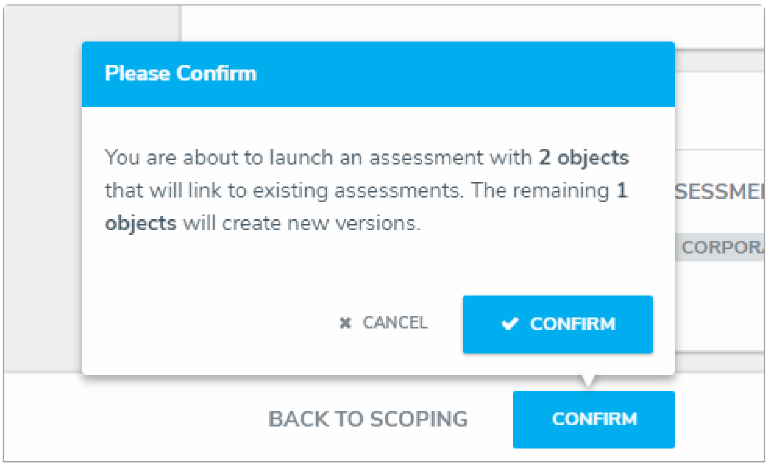


The Review Objects page.

3. To select which instances to rely on (reuse from a previous assessment) globally instead of selecting them individually, click **Assessments** in the **Global Assessment Selection** section to display the available objects, then select existing instances you wish to link to. Hovering your cursor over the ellipsis icon beside an instance will display additional information, including the **Assessment Type**, **Unique ID**, and **Created On** date.
4. To individually select the instances to rely on, click **Assessments** to expand it and select the **Link to Existing** as needed. By default, **Create New Version** is selected. If you made

selections in the **Global Assessment** section that conflict with selections made on an individual object, a notification banner will display.

5. Click **Confirm** to view a summary of the objects added to the assessment from this page, including the number of linked existing objects and new versions.



A summary of the objects added to the assessment from the Review Objects page.

6. Click **Confirm** to launch the assessment. Once launched, additional changes cannot be made.

Add Data to a Previously Launched Assessment

It's possible to add data to a previously launched assessment; however, adding objects to a launched assessment's relationship or reference fields may create clones (or **instances**) of those objects or merely **link** them together, depending on the circumstances and if the **Assessment Data** option is enabled for the corresponding object type.

To check if the **Assessment Data** option is enabled, review the **Configuration tab** of the **Edit Assessment** page. If needed, you can disable this option for one or more object types, add the objects to the assessment, then re-enable the option so that future objects added will have instances created.

It's not currently possible to add previously assessed objects to an assessment after launch.

For more information on instances and reference data and when instances or links are created, see the Assessment Data & Reference Data article.

Delete a Launched Assessment Type

Deleting an assessment type will also delete all objects and instances associated with the assessment. To delete an assessment type, you must have:

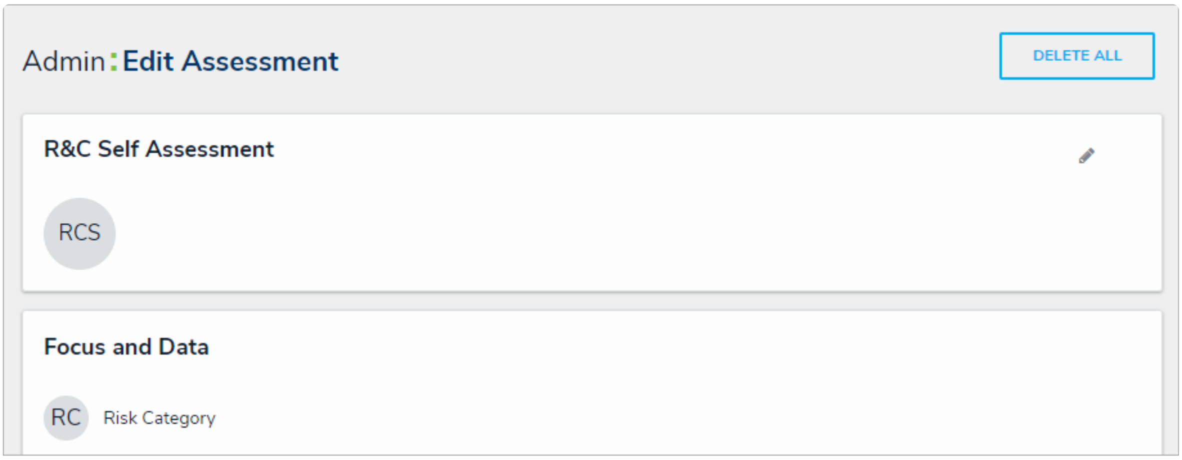
- Administrative privileges enabled on your user account; and
- The assessment type added to your role with Delete permissions enabled for all states for the assessment type and object types included in the assessment OR All Access enabled on your

user account.

To delete an individual assessment object and its instances, see the Delete a Launched Assessment Object article. To delete an assessment that has not yet been launched, see Edit or Delete an Assessment.

To delete a launched assessment type:

1. Click the icon in the top bar > **Assessments** in the **Data Model** section.
2. Click the assessment or enter the name of the assessment in the **Search** field, then click it to display the **Edit Assessment** page.
3. Click **Delete All** at the top-right of the page to the **Confirm Delete** screen.



The Delete All option on the Edit Assessment page.

> If **Delete All** is not visible, ensure your account has admin privileges. Additionally, Delete permissions must be enabled on your role for all the assessment workflow states **OR** All Access must be enabled on your account.

4. Type **yes** in the text field (not case-sensitive), then click **Delete ALL**.

> Deleting an assessment will delete **all** its objects and instances. Referenced objects mapped to the assessment are not deleted.

Delete a Launched Assessment Object

Deleting an assessment object will delete the individual object, together with any instances and links to reference data. To delete an assessment object, you must have:

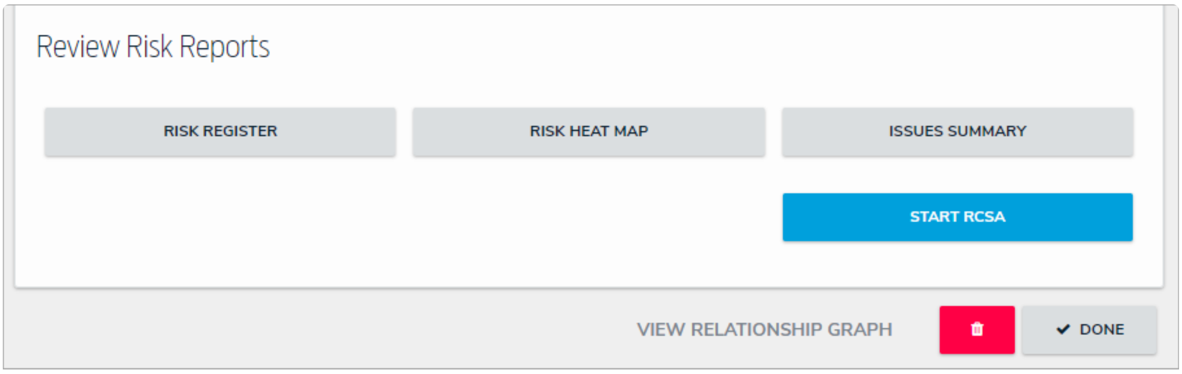
- Administrative privileges enabled on your user account; and
- The assessment type added to your role with Delete permissions enabled for all states for the assessment type and object types included in the assessment OR All Access enabled on your user account.

Deleting an assessment object will **not** delete the assessment type. To delete a launched assessment type and all its objects and instances, see the Delete a Launched Assessment article.

To delete an assessment that has not yet been launched, see Edit or Delete an Assessment.

To delete an assessment object:

1. Open the assessment object by navigating to it in a view or using the search tool.
2. Scroll to the bottom of the page to locate the  icon.



The Delete icon at the bottom of an assessment object.

3. Click the icon to display the **Confirm Delete** window and review the number of objects (including instances) in the assessment that will also be deleted.

> Referenced objects mapped to the assessment are **not** deleted.

4. Type **yes** in the text field (not case-sensitive), then click **Delete**.